Winchester District Development Framework

'Plans for Places – *After Blueprint*'

HOUSING TECHNICAL PAPER

Winchester City Council, June 2011

Introduction

1.1 The Coalition Government is in the process of bringing forward legislation which will enable it to abolish Regional Plans. One of these Plans, the South East Plan (2009), had provided the housing requirements with which the City Council's emerging Local Development Framework (LDF) Core Strategy would be required to conform.

1.2 With the Government's formal announcement of its intention to abolish Regional Strategies in May 2010 the City Council resolved that it would wish to take the opportunity to review its housing needs and to develop a locally-derived housing target. This reflected its commitment to implement the Government's 'Localism' agenda and the first key stage of the process saw the launch of 'Blueprint' in October 2010.

1.3 Blueprint was an innovative public involvement exercise which encouraged local people, groups and communities to think about the future development and other needs for their communities. It did not promote any particular scale or location of development but sought views on what these should be. This proved very successful and many events were held and responses received. Sometimes the views about the future of specific settlements were very consistent, but often they were not.

1.4 Although it promotes the development of locally-derived development targets, the Government remains of the view that these need to be robust and evidence-based. Local views on the scale and type of development needed form an important component in deriving such targets, but there is also a need for sound 'technical' evidence.

1.5 This 'Technical Paper' draws on various sources of technical evidence, as well as responses to Blueprint, to devise a suggested new target for housing provision in Winchester District. This has contributed to the formulation of 'Plans for Places – *After Blueprint*', the document which sets out the Council's proposals in relation to the levels, type and location of particular types of development in the District.

2 Purpose of This Document

2.1 Government advice continues to emphasise the need for an evidence-based approach when assessing the appropriate level of housing to plan for. This should take account of various factors, including national planning policies, evidence of current and future levels of need and affordability, Government household projections and the likely availability of sites and the impacts of development (Planning Policy statement 3: Housing, paragraphs 32-35).

2.2 Blueprint has provided some evidence of local needs but, as would be expected with this type of exercise, most respondents did not seek to undertake a technical evaluation of housing or other needs. This does not devalue these contributions and they remain valuable in giving a picture of the perceived needs in specific areas. However, some technical assessment is needed to help identify District-wide needs and establish the targets to which the sum of local housing development should contribute.

2.3 Some respondents to Blueprint suggested specific housing targets for various settlements but only one undertook a technical assessment of the need for housing. This was Cala Homes (South) who appointed consultants Nathanial Lichfield and Partners (NLP) to produce an assessment which looked at several potential scenarios. Although this was concerned particularly with establishing need in Winchester it produced District-wide and Partnership for Urban South Hampshire (PUSH)/non-PUSH figures to achieve this. References are made within this Paper to the NLP assessment.

2.4 The Council commissioned a Strategic Housing Market Assessment (SHMA) jointly with neighbouring authorities, which was published in 2007 and updated (for Winchester District only) in 2010. As the South East Plan set out housing requirements at the time, the SHMA did not seek to derive a District-wide housing requirement. It does, however, contain a large amount of up-to-date and relevant information about housing needs, the housing market, affordability, etc. The SHMA is part of a very comprehensive LDF evidence base which has been drawn upon, including an Economic and Employment Land Study, Strategic Housing Land Availability Assessment (SHLAA), Affordable Housing Viability Studies and Strategic Site Assessments.

2.5 Government advice is that local authorities should plan for housing over a period of at least 15 years. With the Core Strategy not programmed for adoption until 2012/13 this requires a Plan-period which extends beyond the originally-envisaged end date of 2026. As household projections now extend to 2031, and with the Local Plan's saved housing policies referring to the period to April 2011, it makes sense to revise the Core Strategy Plan-period to run from April 2011 to March 2031. This would also fit well with the base date of the current (and future) Census.

2.6 This Paper looks at various scenarios for population and housing change, as did NLP. Housing change does not happen in a vacuum and will be heavily influenced, whether consciously or not, by the assumptions, aspirations and policies applying now and in the future. There is not, therefore, necessarily a 'right' technical answer to the question of how much housing is needed as this will depend on what any particular area is trying to achieve. It will depend on aspirations, but is also likely to be a compromise between these and what it is desirable, feasible, viable and possible to influence.

2.7 This Paper reaches a conclusion about which scenario should form the basis for the future level of housing development, and which would not meet the District's needs or be suitable for adoption. It also identifies the need for some further work, particularly in terms of updating the work on economic needs, which may result in some changes to the housing requirement proposed. This Technical Assessment is published as a background paper to 'Plans for Places' and the Council will consider any comments received on it.

2.8 The conclusions of this Paper have fed into the process of balancing the 'technical' needs for housing with the needs identified through the Blueprint process, to produce a housing target and a development strategy that best meets the aspirations of the District. This will be published for consultation as 'Plans for Places – *After Blueprint*' during Summer 2011. The outcome of this consultation and the further work identified in this Paper will feed into the Council's Core Strategy, which is due to be published at the end of 2011, prior to submission to Government.

3 Evidence Base and Scenarios

3.1 As noted above, there is not simply one ‘right’ technical answer to the question of how much housing is needed. There are many sources of evidence and various scenarios can be produced, depending on the priorities and aspirations for the area.

3.2 One of the key evidence sources in relation to this Paper is the Strategic Housing Market Assessment (SHMA) update of 2010, produced for the Council by DTZ consultants. This is a very comprehensive document but it does not attempt to quantify the scale of new housing generally needed. The consultants also produce annual Monitoring Reports, the most recent also being 2010. There is no need to quote extensively from the SHMA or the update here, but there are some key points arising:

- The housing market within Winchester District is broken down into the Central and South Hampshire Market Areas. The Central Hampshire market is not a tightly integrated area, being made up of a series of localised and interconnected market areas, whereas the South Hampshire market area is more focussed but has very strong relationships in view of the levels of commuting from South Hampshire into Winchester;
- There is detailed migration information which shows that migration levels to/from other parts of Hampshire are generally in balance but that there is significant in-migration to the District from the rest of the South East and London. This information relates only to 2008 so needs to be treated with some caution (and some of the population/household projection scenarios used will have their own in-built migration assumptions). The rate of population growth in the District over recent years suggests that significant in-migration is an on-going feature, although the 2010 Monitoring Report suggests a substantial reduction since 2008;
- The rate of population change in the District over the last 10 years has been similar to Central Hampshire, South Hampshire and the South East (6% increase 1998-2008). The 0-14 age group has increased more than other cohorts (and 15-24 significantly less). The 0-14 and 25-44 age groups feature most in terms of in-migration, suggesting the District is attractive to younger families, particularly from other parts of the South East (including London);
- Analysis of the type of households shows some significant differences within the District. Winchester itself has significantly higher levels of single person households and students than the District as a whole, with correspondingly lower proportions of family housing. The South Hampshire part of the District on the other hand has lower levels of single person households and higher levels of family households. On the whole, the District has slightly higher levels of single person households and lower family households than other parts of Hampshire or the South East (2001 Census data);

- There are significant differences in household and individual earnings between different areas. In South Hampshire, household and individual earnings are substantially lower than in Winchester District, which itself has slightly lower levels than Central Hampshire. Winchester District has lower household incomes than the South East, but higher individual earnings;
- The ratio of jobs to households is higher in the District than in South or Central Hampshire (more jobs than households), even though the growth in jobs over the previous 10 years has been lower (about 3%) than population change (about 6%);
- Unemployment rates in Winchester District have been generally lower than the rate typically associated with full employment (2%). However, unemployment doubled to 1.8% between 2008 and 2009 although it remained lower than Central Hampshire and much lower than South Hampshire and the South East (the rate had increased further to 5.6% in the 2010 Monitoring Report);
- Within the District 71% of homes are privately owned, 16% social rented and 13% private rented (2001 Census). The proportions of ownership are lower in Winchester and the Central Hampshire part of the District, with correspondingly higher social renting (especially in Winchester town) and private renting in these areas. The privately rented sector is expected to have grown significantly and the boom in 'buy to let' from 1998-2003 is noted. The District has a high proportion of detached property compared to other parts of Hampshire or the South East, but it is particularly concentrated in the south of the District. The south of the District has a correspondingly low level of terraced houses and flats whereas Winchester itself has a low proportion of detached houses and a high proportion of flats;
- House prices in Winchester District are significantly higher than other Hampshire sub-areas or the South East. The northern part of the District is more expensive than the south, especially for detached property. To buy a property in the 'lower quartile' of District house prices would require an income of £63,400 (£62,800 in the 2010 Monitoring Report) and deposit of £21,100, with these figures rising significantly for the Central Hampshire part of the District. On this basis 84% of Winchester District households would be unable to buy a lower quartile home (rising to 96% in the Central Hampshire part of the District). About 54% of households would be able to rent in the private market but unable to buy, although they may be eligible for 'intermediate' (low cost home ownership) products;
- The need for affordable housing is estimated at 375 dwellings per annum, excluding 'band 5' of the waiting list and not taking account of new completions (i.e existing and newly arising need taking account of relates and transfers). Whilst many households in need require 1 and 2 bedroom dwellings, these tend to arise most through re-letting and the greatest need for new accommodation is for 3 bed units. There are over 500

households actively seeking intermediate housing, although many more could potentially be interested on the basis of income levels.

3.3 Planning Policy Statement (PPS) 3: Housing suggests that one of the factors which should be taken into account is the Government's latest household projections and economic growth forecasts. Accordingly, one of the scenarios is called 'Government projections' and is based on the household projections arising from the Office of National Statistics (ONS) Sub-National Population Projections. Hampshire County Council has modelled such a projection for the period 2011-2031. The model produces figures for the number of dwellings needed to accommodate the projected population and household changes. NLP also produced a 2008-based SNPP projection (using a different model). Although this covered a different period (2010-2026) it did produce an annual figure for comparison.

3.4 Another scenario that is often produced as a basis for comparison is based on 'Zero Net Migration' (ZNM). Rather than being a projection of what is likely to happen based on existing trends and expected changes, this scenario is based on a model that constrains the assumptions about migration so that inward and outward migration is balanced. Hampshire County Council has produced ZNM projections for each District as an illustration of the level of housing likely to be needed if each area 'consumed its own smoke'. NLP produced a ZNM projection and, although this covered the period 2010-2026, it produced an annual figure for comparison.

3.5 The assessment of housing need produced by NLP for Cala Homes included an 'Economic Growth' scenario. This sought to use the figures for potential job growth from the 2007 Winchester Economic and Employment Land Study (SQW) to derive changes in economic activity, population and housing. The key conclusions of this work are presented and extrapolated for the 20-year periods under consideration. It is, however, concluded that there are substantial concerns about the accuracy and applicability of this methodology, especially in the absence of an update to the Economic Study which could take account of more recent economic changes.

3.6 The Strategic Housing Market Assessment shows a substantial need for affordable housing provision and this is a priority for the Council. The level of need has been quantified by the SHMA as 375 dwellings per annum and it is possible to calculate how much market housing is needed to achieve this level of provision, assuming that planning policies require either 30% or 40% of new homes to be affordable. NLP produced such a calculation although since their report was produced the Government has announced major changes to the way affordable housing is provided, managed and funded.

3.7 As well as the scenarios mentioned above, it is informative to take account of the existing housing target in the South East Plan, the

‘Option 1’ requirement (the figures recommended for inclusion in the South East Plan by the local authorities) and of past completion rates. Whilst these should not dictate future housing provision they can help to identify whether particular scenarios differ significantly from past development rates or those planned at various stages of the South East Plan.

3.8 The scenarios examined are, therefore:

- Government projections (ONS 2008-based SNPP from 2011-2031 applied to Winchester District);
- Zero Net Migration
- Economic-based projections
- Affordable housing-led projections

In addition, account is also taken of the completion rates which would have arisen from the South East Plan, and historic rates of housing development.

4 Scenario 1 – Government Projections

4.1 Hampshire County Council have used the specialist ‘Chelmer’ model, which is recognised and well respected software, for producing population projections to project the effect of applying the ONS 2008-based Sub-National Population projections (SNPP). The model was calibrated to include the best estimate of existing dwellings at April 2011 (based on the draft results of site surveys in March 2011) as the aim was to use the most up to date information, rather than estimates or forecasts of the ‘starting’ number of dwellings.

4.2 The ONS SNPP population figures for Winchester District were then applied to arrive at a projection of population change to 2031. The ONS SNPP figures are a national set of projections based on past trends in births, deaths and migration produced at the local authority level and the most recent set are 2008 based. At this point in the Chelmer model the dwelling figures become an output from the model, derived from the population projections. They are the dwellings that would be required should the population of the SNPP and the assumptions surrounding household headship rates, etc be realised.

4.3 The following Table 4.1 summarises the ONS 2008-based SNPP projections for Winchester District by 5 year periods and Table 4.2 looks at the change in population, economically active residents and dwellings for each period.

Table 4.1 WINCHESTER DISTRICT SUMMARY STATISTICS Government Projections Scenario (projected figures rounded to nearest 50)

Year	2001	2006	**2011**	**2016**	**2021**	**2026**	**2031**
Population	107,220	112,924	**117,050**	**119,200**	**124,000**	**129,100**	**133,600**
Dwellings	44,420	47,079	**49,300**	**51,200**	**54,200**	**57,350**	**60,300**
Ec. Active	54,867	57,780	**59,450**	**59,900**	**61,600**	**64,200**	**66,000**

Table 4.2 WINCHESTER DISTRICT POPULATION AND DWELLING CHANGE Government Projections Scenario (projected figures rounded to nearest 50)

Period	2001-06	2006-11	**2011-16**	**2016-21**	**2021-26**	**2026-31**	**TOTAL 2011-31**
Population Total	5,704	4,114	**2,150**	**4,800**	**5,100**	**4,500**	**16,550**
Dwellings	2,659	2,213	**1,900**	**3,000**	**3,150**	**2,950**	**11,000**
Econ. Active	2,913	1,663	**450**	**1,700**	**2,600**	**1,800**	**6,550**

4.4 The total population increase projected from 2011 to 2031 is 16,550 and the total dwelling increase needed to accommodate this is 11,000. The increase in economically active population from 2011 to 2031 is 6,550. The NLP work for Cala Homes included a similar scenario, but used a different model and covered a different time period (2010-2026). Nevertheless, this produced a very similar annual rate of development (556 per annum) to the methodology above, which gives an annual rate of 550 from 2011-2031.

4.5 The figures suggest a dip in population and housing increases in the 2011-16 period when compared to the previous and subsequent periods. This is due to the assumptions used to calibrate the existing number of dwellings in the model at the base date of 2011. It will be noted that this is consistent with the fall in dwelling completions in the 2006-11 period and may, therefore, prove to be an accurate projection given the low level of housing completions caused by the current recession.

4.6 The smallest geographical areas used for the ONS projections are District Council areas and it is not therefore possible to produce ONS 2008-based SNPP projections tailored to different parts of the District. Whilst Hampshire County Council has used the Chelmer model to derive projections for sub-District areas, it is important to recognise that these simply apply District-wide assumptions and trends to sub-divisions of the District. As such they need to be treated with caution, especially as a basis for estimating housing provision at the sub-District level.

4.7 Tables 4.3 and 4.4 set out the situation in the part of the District covered by the Partnership for Urban South Hampshire.

Table 4.3 PUSH SUMMARY STATISTICS Government Projections Scenario (projected figures rounded to nearest 50)

Year	2011	2016	2021	2026	2031
Population	36,550	37,200	38,700	40,250	41,600
Dwellings	15,050	15,600	16,550	17,500	18,400
Ec. Active	18,500	18,650	19,200	20,050	20,600

Table 4.4 PUSH POPULATION AND DWELLING CHANGE Government Projections Scenario (projected figures rounded to nearest 50)

Period	2011-16	2016-21	2021-26	2026-31	TOTAL 2011-31
Population Total	650	1,500	1,550	1,350	5,050
Dwellings	550	950	950	900	3,350
Econ. Active	150	550	850	550	2,100

4.8 Tables 4.5 and 4.6 include the equivalent information for the part of the District in the South Downs National Park.

Table 4.5 SDNP SUMMARY STATISTICS Government Projections Scenario (projected figures rounded to nearest 50)

Year	2011	2016	2021	2026	2031

Population	**11,850**	**12,050**	**12,550**	**13,100**	**13,550**
Dwellings	**5,050**	**5,200**	**5,550**	**5,850**	**6,150**
Ec. Active	**5,900**	**6,000**	**6,150**	**6,450**	**6,650**

Table 4.6 SDNP POPULATION AND DWELLING CHANGE Government Projections Scenario (projected figures rounded to nearest 50)

Period	**2011-16**	**2016-21**	**2021-26**	**2026-31**	**TOTAL 2011-31**
Population Total	**200**	**500**	**550**	**450**	**1,700**
Dwellings	**150**	**350**	**300**	**300**	**1,100**
Econ. Active	**100**	**150**	**300**	**200**	**750**

4.9 The part of the District which is neither in the PUSH area or the National Park is summarised in Tables 4.7 and 4.8 below:

Table 4.7 REST OF DISTRICT SUMMARY STATISTICS (Government Projections Scenario)

Year	**2011**	**2016**	**2021**	**2026**	**2031**
Population	**68,600**	**69,950**	**72,750**	**75,750**	**78,450**
Dwellings	**29,200**	**30,400**	**32,100**	**34,000**	**35,750**
Ec. Active	**35,000**	**35,250**	**36,250**	**37,700**	**38,750**

Table 4.8 REST OF DISTRICT POPULATION AND DWELLING (Government Projections Scenario)CHANGE

Period	**2011-16**	**2016-21**	**2021-26**	**2026-31**	**TOTAL 2011-31**
Population Total	**1,350**	**2,800**	**3,000**	**2,700**	**9,850**
Dwellings	**1,200**	**1,700**	**1,900**	**1,750**	**6,550**
Econ. Active	**250**	**1,000**	**1,450**	**1,050**	**3,750**

4.10 More detailed projections setting out the anticipated age breakdowns and household types forming (District-wide and for sub-areas) are set out at Appendices 1-3. These confirm that in this scenario all of the age groups maintain or increase their population numbers over the period 2011-2031. In line with national trends, the largest proportional increases are in the over-65 age ranges. In terms of household types, married households decline over the period with all other types increasing in number. The largest proportional increases are in cohabiting couples households and one-person households.

Discussion and Conclusions

4.11 This scenario is good at projecting key population and household trends and has been found to produce very robust results at the national level. This robustness reduces for smaller geographical areas and the District level is the smallest area at which it is used by ONS.

4.12 As it is based on projecting past trends forward, it cannot anticipate significant changes which may be taking place now or in the future. This is particularly relevant in the current economic situation, with the current period of no/low economic growth expected to last longer than previous economic recessions and to recover to a lower level than in the past. Although the trends are long-established and the period under consideration is likely to span several economic cycles, the current economic recession is generally viewed as being particularly deep and prolonged.

4.13 This may affect the ability and propensity of people to form households and the type of accommodation they seek or can afford. The situation may be compounded by many of the younger generation of household-formers being subject to high levels of debt (due to education costs), affecting their ability and willingness to secure mortgages, and by changes to the affordable housing, benefits and welfare systems. Although the detailed implications of these changes are not yet clear, their overall effect would appear to be to reduce the ability or propensity to create separate households. The 2010 SHMA Monitoring Report supports this view and anticipates an increase in 'concealed households' as young adults and couples find it difficult to access housing because of tighter mortgage conditions and uncertain job prospects.

4.14 The Council's Economic and Employment Land Study (2007) was undertaken before the scale of the recession became apparent and did not seek to model these effects. Therefore, it is proposed that further work to update the situation be undertaken to try to define the scale of any effects on future changes to the projections of population, households and economically activity. In the meantime it is noted that the Partnership for Urban South Hampshire (PUSH) has updated its economic strategy in the light of the recession and that this has resulted in its housing targets reducing by 8% from 80,000 dwellings to 74,000.

4.15 The housing targets adopted by PUSH were economically-led so it may not be appropriate to apply this scale of reduction to the ONS 2008-based SNPP projections. In the absence of further work, it is possible only to conclude that the projection of 11,000 dwellings may be at the upper end of any level of housing that may be reached under this scenario.

4.16 The projections anticipate that migration will make up a large proportion of the population increases expected over the 20 year period. Migration therefore drives much of the corresponding dwelling need, although this is not unusual or new and generally reflects trends from 2001-2011. Migration refers to movement into or out of the District and, whilst this includes an element of international immigration, it will be noted from the SHMA that most in-migration to the District is from Hampshire and the South East (including London).

4.17 Without net in-migration there would be an fall in population overall, with the only increases being in the older age groups (see Zero Net Migration scenario). Maintaining a stable population in all age groups is important to ensure mixed and balanced communities, as well as to maintain economic activity and local services, and migration is a positive factor in securing this. Migration is not therefore something that should be viewed as a bad thing and in any event there are no planning or other powers available to prevent people moving into or out of the District from elsewhere within Hampshire or the UK.

4.18 However, this scenario does have particular limitations below the District-wide level. Using it for sub-District areas means applying the District-wide trends in migration, household formation, etc. Tables 4.3 – 4.8 above do this, but the resulting figures take no account of the different policy context which applies in various parts of the District, or of the level and location of existing development commitments, the character and capacity of various areas, or the local needs for development. Winchester District has a widely varying planning policy context, from the PUSH area in the south where the local authorities are promoting an economically-led strategy, to the South Downs National Park which now has a separate planning authority whose primary aim is to deliver National Park objectives of conservation and promotion of public enjoyment of the Park.

4.19 Accordingly, any breakdown of the District-wide housing need should seek to avoid calculating sub-District figures simply on the basis of the existing population or geographical extent of the relevant sub-area. To do this could ignore local characteristics, policy context and needs. The Blueprint exercise has given a good indication of how local communities view many of these factors and it is the ‘bottom-up’ output of the Blueprint exercise, rather than a ‘top-down’ apportionment of the District-wide figures, which should also be used to define sub-District housing requirements.

5 Zero Net Migration

5.1 Zero Net Migration is another form of population and housing projection, which is based on the assumption that the net effect of migration is neutral. The 'Chelmer' model is also used to run this projection, but the model is controlled to the assumption that the number of in-migrants will be balanced by out-migrants (producing no net migration). This leads to a very different output to scenario 1 above.

5.2 The model has been run to cover the period to 2031 at a District-wide level and the following Table 5.1 summarises the Zero Net Migration (ZNM) projections for Winchester District by 5 year periods and Table 5.2 looks at the change in population and dwellings for each period.

Table 5.1 WINCHESTER DISTRICT SUMMARY STATISTICS (Zero Net Migration)

Year	2001	2006	**2011**	**2016**	**2021**	**2026**	**2031**
Population	107,220	112,924	**116,250**	**116,450**	**116,450**	**116,150**	**115,400**
Dwellings	44,420	47,079	**49,000**	**50,100**	**51,100**	**51,950**	**52,550**
Econ. Active	54,850	57,800	**58,950**	**58,250**	**57,250**	**57,000**	**55,950**

Table 5.2 WINCHESTER DISTRICT POPULATION AND DWELLING CHANGE (Zero Net Migration)

Period	2001-06	2006-11	**2011-16**	**2016-21**	**2021-26**	**2026-31**	**TOTAL 2011-31**
Population Total	5,704	3,304	**200**	**0**	**-300**	**-750**	**-850**
Dwellings	2,659	1,901	**1,100**	**1,000**	**850**	**600**	**3,550**
Econ. Active	2,900	1,150	**-700**	**-1,000**	**-250**	**-1,000**	**-2,950**

5.3 Under this scenario the projection is that the population would fall from 2011 to 2031 by about 850, although an increase in dwellings of over 3,500 would still be needed. This is because household size would continue to fall, so a larger number of dwellings is required even to accommodate a slightly smaller population. The NLP work for Cala Homes included a similar scenario, but used a different model and covered a different time period (2010-2026). This produced a somewhat higher annual rate of development (236 dwellings per annum) to the methodology above, with gives an annual rate of 178 from 2011-2031.

5.4 More detailed projections setting out the anticipated age breakdowns, household types forming and economically active are set out at Appendix 4. These confirm that in this scenario only the 65+ age groups increase their population numbers over the period 2011-2031, with all other age groups declining.

5.5 There are very large proportional increases in the over-65 age groups, ranging from 24% in the 65-74 age group to 94% in the 85+ group.

The largest proportional decline is in the 0-4 age group (16%), no doubt reflecting the fact that the next largest reduction (13%) is in the 30-44 age group, which would be expected to include many young families.

5.6 The number of economically active residents falls by a total of about 2,950 (5%) between 2011 and 2031 under this scenario. The NLP projections for this scenario produced an output for the 'indigenous labour force', which showed a fall of 6,748 (12%) from 2010-2026, but it is not clear if these definitions are comparable. In any event, the fall in economically active population is considerable and larger in size than the reduction in the overall population level.

Discussion and Conclusions

5.7 This scenario was used as the basis for the illustration of 'natural change' in the Blueprint profiles for the District and settlements. This was chosen as it is a less technical term than 'Zero Net Migration', although it is something of a misnomer. Zero Net Migration (ZNM) is an artificial scenario which ties projections to a particular assumption about migration. In practice there is inward migration to the District and the ZNM assumption makes the trends towards an aging population more pronounced.

5.8 The ZNM scenario is, therefore, a rather 'unnatural' scenario. As noted above, it tends to pronounce the effect of an aging population and results in reductions in the size of younger age groups, especially young families. This is reflected in the substantial decrease in the economically active population that is projected in this scenario.

5.9 Whilst the planning strategy can set out the amount of housing to be provided, planning and other policies are not able to control migration into or out of a local authority area. Therefore, although a ZNM strategy would constrain the amount of housing developed, those who can out-compete other potential occupiers (by being able to afford higher purchase prices or through qualifying for affordable housing) will in practice continue to move into the area. Migration will therefore continue, making competition for the more limited supply of market and affordable housing more intense. Housing availability is likely to be limited to those with either the greatest resources (to be able to afford to purchase) or the greatest needs (to qualify for a limited stock of affordable housing).

5.10 As such the ZNM scenario would run counter to all three of the Council's Community Strategy objectives:

- Active Communities - this scenario is likely to work against the objective of maintaining mixed and active communities by tending to provide only for those most or least able to afford housing. Communities are likely to become less diverse in terms of their social makeup, age structure and needs. This in turn is likely to make it difficult to maintain some services (e.g. smaller village schools) whilst putting great pressure on others (e.g. older person's support);

- Prosperous Economy – this scenario is likely to be harmful to the local economy as businesses find that the available workforce declines and the cost of premises increases due to competition with housing use. Employees who are not in highly paid work will find it increasingly difficult to afford to live locally, increasing commuting and causing problems especially for firms or services trying to attract staff to the area;
- High Quality Environment – this scenario may reduce the impact of house-building on the local environment to some extent, but is likely to increase unsustainable patterns of living and working. Services may be more thinly spread, especially for those groups whose numbers are declining, and the employees of businesses and services are likely to have to commute longer distances if they cannot afford to live close to their work, or if there are less jobs available.

5.11 Like the ONS 2008-based SNPP scenario, Zero Net Migration does have particular limitations below the District-wide level. Using it for sub-District areas would mean applying the District-wide assumptions. In view of the major shortcomings of this scenario set out above it is not recommended that it be taken forward as a basis for deriving housing needs for the District. Accordingly, there is no merit in seeking to produce sub-District projections for the ZNM scenario. Whilst it may be that the constraints applying in some parts of the District, or in some settlements, mean that housing provision will need to be constrained, this should be assessed for each area, not by applying ZNM assumptions generally at the District, sub-area or settlement levels.

5.12 Accordingly, it is concluded that the Zero Net Migration scenario would have such undesirable effects when compared to the Council's Community Strategy and sustainability objectives that it should not form the basis for determining housing provision at the District level or for any sub-area.

6 Economic-Based Projections

6.1 One of the Council's objectives is to maintain economic prosperity and tackle deprivation within the District. The promotion of a successful economy is therefore an important consideration and may be influenced by the level, type and location of housing provision. The housing requirement for the Partnership for Urban South Hampshire (PUSH) was derived from its economic strategy for the area, but this has not been the basis for deriving housing requirements in other parts of the District.

6.2 The NLP housing assessment (for Cala Homes) attempted an economically-led housing scenario, based on the economic forecasts included within the Winchester Economic and Employment Land Study 2007 (SQW). The NLP report converts the job growth estimated by SQW into an increase in the labour force of 5,900 (2010-2026). This would in turn require an increase of 12,500 dwellings over the same period. If the annual rates calculated by NLP were applied over a 20-year period they would equate to an increase of 10,760 additional jobs, a further 7,420 economically active population and 15,640 dwellings, as illustrated below.

Table 6.1 ECONOMICALLY-LED CHANGE (based on NLP work for Cala Homes)

	2010-26 change	**Pro-rata Annual change**	**Pro-rata 20-year change**
Number of jobs	**8,610**	**538 (0.8%)**	**10,760 (15.7%)**
Econ. Active	**5,938**	**371 (0.7%)**	**7,420 (13.4%)**
Population Total	**23,067**	**1,442**	**28,834**
Dwellings	**12,504**	**782**	**15,640**

6.3 The methodology used to derive this scenario is based on several assumptions and multipliers. It starts from econometric projections of the performance of different business sectors, which include adjustments by SQW to reflect likely growth potential in Winchester District. These projections produce an anticipated level of job growth and already include 'regional growth' elements for PUSH and Winchester, in addition to 'local' employment needs. The job growth figures have then been converted by NLP to give the level of increase in economic activity needed to provide the indigenous workforce and this in turn is multiplied up to arrive at the necessary population increase. Finally, the required population increase is converted into a dwelling increase.

Discussion and Conclusions

6.4 Many assumptions and adjustments are needed to arrive at a result using this methodology, even before the already-complex population /

housing model is run. Small changes in these assumptions may result in significant changes to the results and it is important, therefore, to take a 'reality check' on the results. It will be noted that this method produces a job growth of approximately 16% over 20 years, which compares to actual job growth over the last 10 years of 3% (Strategic Housing Market Assessment). The method used by NLP therefore produces a level of job growth which is more than double that experienced in the recent past (based on growth over the last 10 years this would represent more than 50 years of job growth). As all the other components of this scenario are built up from the job growth figures, the likely accuracy of this projection seems highly questionable.

6.5 Doubts about the accuracy of this methodology are further compounded by the fact that the Economic Study was undertaken prior to the current recession, which tends to confirm that the resulting growth projections are likely to be significantly overstated.

6.6 In addition, account also needs to be taken of the existing nature of the District, which has a higher number of jobs than households, with this being especially pronounced in Winchester. Therefore a strategy of promoting much higher rates of job growth than in the past, and correlating housing provision to this, does not respond to the circumstances of the District. This is not to say that there is no need for additional housing, as the jobs/worker imbalance does indeed suggest such a need. Nevertheless, projections of major increases in the rate of job growth appear neither very realistic in the current economic climate, nor a suitable key driver for housing provision across the District.

6.7 In the PUSH area, where economic growth is a priority, the housing targets have in the past been derived from economic objectives. The economic projections which drive the PUSH housing requirement have recently been updated, resulting in a downward adjustment of the levels of housing proposed. Whilst an economically-led strategy may remain generally sound for the PUSH area, it would not be appropriate to derive a District-wide housing target on this basis.

6.8 As noted above (paragraph 4.14) work is planned to update the Economic Study to take account of changes in the economy since 2007. This may enable a more realistic basis for an economically-led housing projection. Even so, the difference in economic objectives between different parts of the District (e.g. PUSH and the National Park) suggest that this scenario should not be used as a basis for deriving District-wide housing projections.

7 Affordable Housing-Led Projections

7.1 The affordability of housing and the level of need for affordable housing are often raised as key issues for the District. The Strategic Housing Market Assessment (SHMA) sought to establish the level of affordable housing provision that would be needed to overcome existing shortfalls and to meet newly-arising need. The SHMA 2010 update puts the required level of provision at about 375 dwellings per annum. As a result the SHMA recommends that future affordable housing policies should seek the highest level of affordable housing provision which is consistent with maintaining economic viability (40%) from new developments.

7.2 Currently some affordable housing is provided in schemes which consist only of affordable provision, most commonly 'exceptions' sites, but the majority of provision is achieved as a proportion of market housing schemes. NLP therefore developed a scenario in their work for Cala Homes which sought to establish how much housing would need to be provided in total in order to achieve 375 dwellings per annum as either a 30% or 40% proportion of provision. This is a simple mathematical calculation as follows:

Table 7.1 AFFORDABLE HOUSING-LED PROJECTIONS (based on NLP work for Cala Homes)

	Annual affordable need	Annual housing needed at 30%	Annual housing needed at 40%	20-year provision needed at 30%	20-year provision needed at 40%
Dwellings	**375**	**1,250**	**938**	**25,000**	**18,760**

7.3 Using the scenario generated by NLP the 20-year housing requirement which would be needed to generate 375 affordable dwellings per annum would range between 938 and 1,250 dwellings, depending on whether the proportion of affordable housing required was 30% or 40% (as proposed in the Core Strategy Preferred Option).

Discussion and Conclusions

7.4 This scenario gives a very high overall housing requirement, largely because it projects forward an element of provision to overcome the current shortfall of affordable housing, which the SHMA only included for 5 years. Also, the target level of affordable housing provided is in direct proportion to the level of market housing achieved.

7.5 The SHMA update 2010 concludes that the existing level of need for affordable housing (the 'backlog') is 2,294 dwellings (requiring 459 dwellings per annum over 5 years). It includes this element within the total amount of affordable housing needed, thus meeting the backlog within 5 years. However, the NLP affordable housing-led scenario projects the total annual affordable housing need of 375 dwellings (which includes the backlog element) over the whole of the period under consideration (16 years, 2010-2026) and the above table extends this to a 20 year period. The result is that the backlog is double-counted - in fact projecting the 'backlog' over 16 or 20 years resolves the backlog 3-4 times over, rather than once. This is clearly a major flaw of the methodology and the resulting housing figure of 18,760-25,000 calculated using this scenario greatly over-states the requirement and is not a technically sound basis for developing overall housing requirements.

7.6 This illustrates the dangers of taking a figure which estimates need over a specific 5 year period (2010-2015) and projecting it forward. Not only does the 375 dwellings per annum figure assume that the backlog is met in the 5 year period, it includes assumptions about the number of people in housing need, newly-arising needs, the rate of re-lets and transfers, etc. Any of these assumptions may change (for example, the number of households in need has increased by about 1,000 since the SHMA update) and, as noted below, substantial changes are proposed to the affordable housing and benefit systems. It cannot, therefore, be assumed that the circumstances that led to an estimated need of 375 affordable dwellings from 2010 to 2015 will continue to require the same level of need until 2026 or 2031.

7.7 Since NLP developed this scenario, the Government has announced major changes to the way affordable housing is funded and delivered, and to the benefits system. Councils and Registered Providers will be able to charge up to 80% of market housing rents on re-lets and new lettings and the funding system for new affordable housing will be based on the assumption that the majority of funding comes from increased rental levels rather than from public subsidy or grants. Whilst it may still be possible to re-let property, or develop new property, at lower rental levels this may not be financially attractive and the level of future provision at below 80% of market rents is currently uncertain.

7.8 The overall effect of these changes is to signal that households that cannot afford 80% of market rents should not expect to be able to afford independent housing, unless they qualify for support through the benefit system, although this is also under review. The precise implications of these changes have yet to be seen and it is currently too early to estimate exactly what they may be. However, the likelihood is that certain households that may currently aspire to an independent home may find that future provision is no longer within their reach and they have to stay in shared or family accommodation for longer or even indefinitely. In other words the level of household formation may be affected, especially for those that could not afford 80% of market rents but do not qualify for housing benefit either, with the most impact expected to be on single households under 35 years of age.

7.9 It is concluded that the affordable housing-led scenario is not a technically sound basis for developing housing requirements. In addition, the effects of the changes currently proposed by the Government in relation to affordable housing and benefits are currently uncertain and may affect the ability of households to form and seek independent accommodation. Therefore it is concluded that it would not be appropriate to develop the overall housing target using the affordable housing-led scenario.

8 Other Comparators and Conclusions (District Provision)

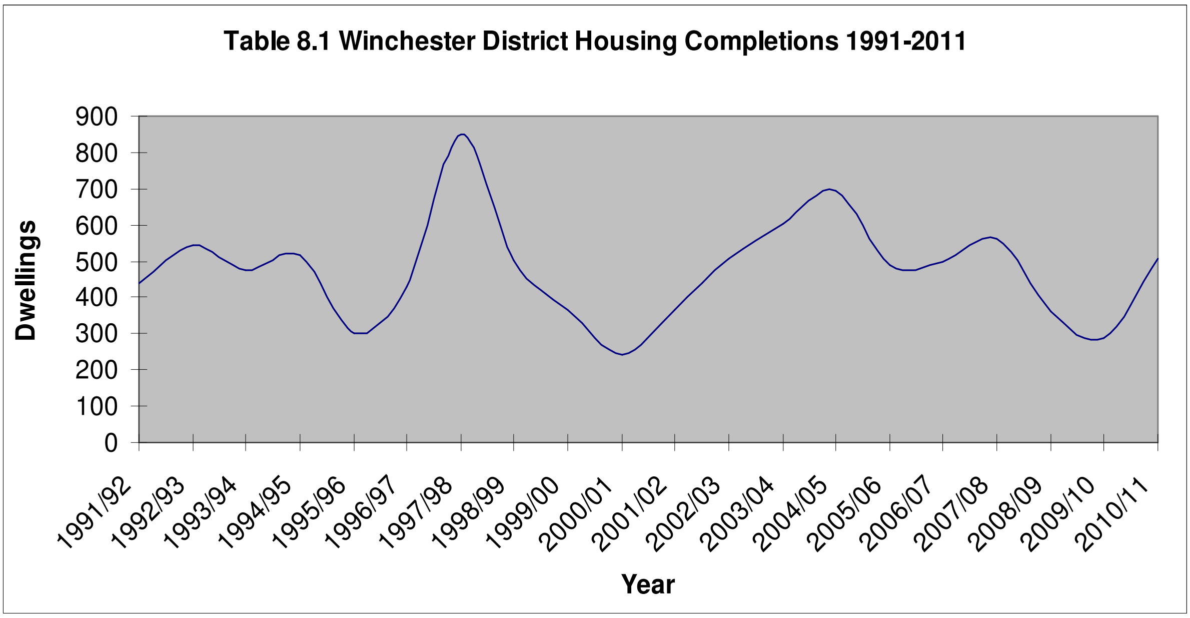
8.1 In considering the applicability of the various methods of calculating housing requirements, it is worth having regard to other 'benchmarks' of provision. While these should not dictate any new housing requirement, it can be informative to see how various scenarios depart from previous levels of provision or requirements.

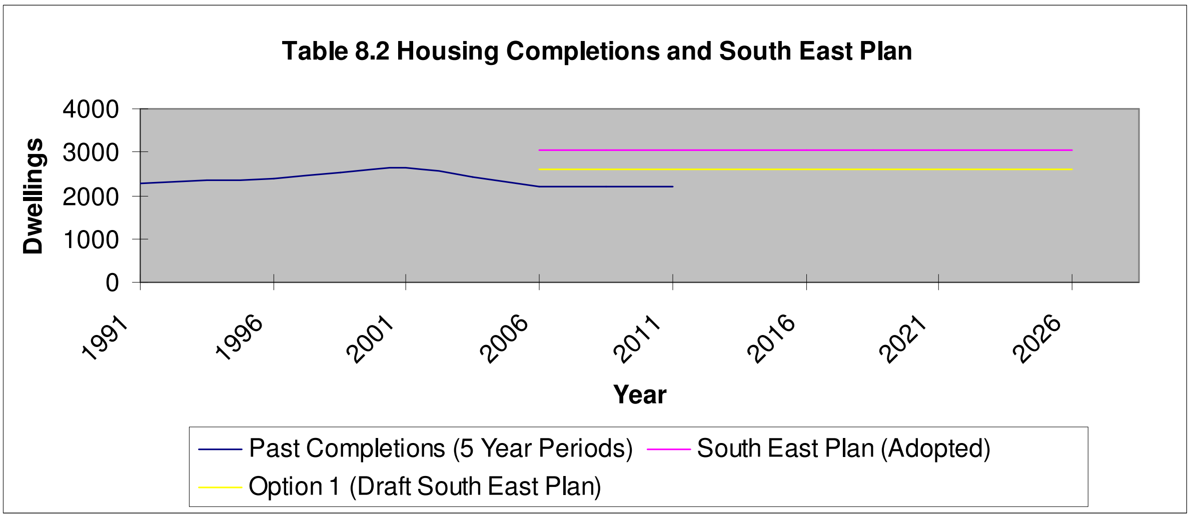
8.2 The South East Plan is currently part of the development plan and was produced taking account of evidence of need and testing through the Public Examination process. Its housing requirement is the outcome of this particular process, although it tends to allocate housing requirements to Districts based on wider regional or sub-regional needs, rather than identifying a Winchester District need. It also takes some account of the constraints and capacity that were seen to apply, although again these are tested at quite a 'coarse' level for the District context.

8.3 In proposing the abolition of regional strategies the Government has indicated that local authorities can consider using the 'Option 1' figures (those which were originally suggested for regional strategies by local authorities). The City Council has used the Option 1 figures in its Annual Monitoring Report to calculate alternative housing land supply figures, pending the completion of work to devise a new housing target. The Option 1 figures for Winchester District include the same target as the South East Plan for the PUSH area, but a lower requirement for the non-PUSH area. They would require a total District-wide provision of 10,440 dwellings over the 20 year period 2006-2026.

8.4 Past housing completion rates are to a large extent the result of the application of past planning strategies and policies. However, they also reflect the market attractiveness of an area, the strength of the local economy and the type of development opportunities that arise (or are allocated). They therefore help to show what might be achievable in market terms and to highlight whether any new requirements would be a significant increase or decrease over what has been delivered in the past.

8.5 Table 8.1 illustrates the fluctuation of housing completion rates over the last 20 years and Table 8.2 evens these out into 5 year periods and compares these to the South East Plan and Option 1 requirements (in 5-year periods).

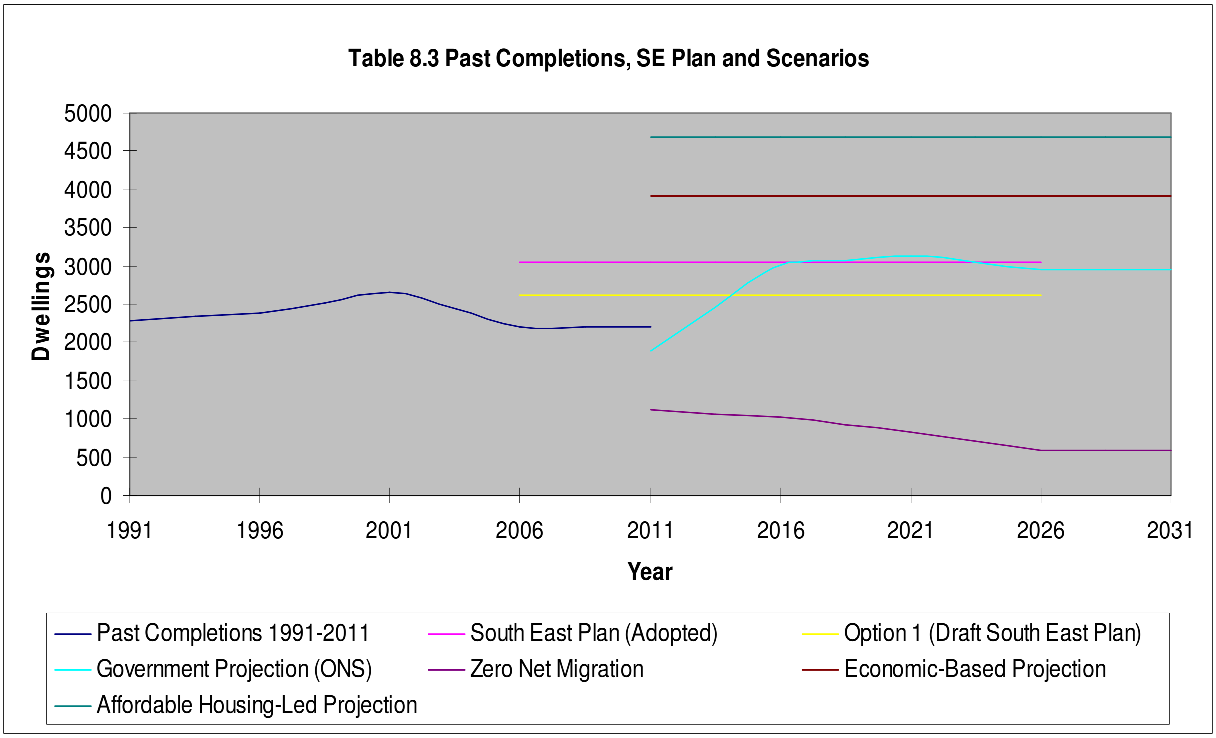




The total completions/requirement for each 20-year period is:

Last 20 Years Completions (1991-2011)	- 9,535 (477pa)
Option 1 District Requirement (2006-2026)	- 10,440 (522pa)
South East Plan District Requirement (2006-2026)	- 12,240 (612pa)

8.6 Table 8.3 compares previous completion rates and the Option 1/South East Plan requirements to the 4 scenarios discussed above:



8.7 It can be seen from Table 8.3 that the Economic-Based Projection and the Affordable Housing-Led Projection scenarios would require levels of housing provision that are considerably in excess of anything achieved in the previous 20 years. They would, therefore, amount to a step-change in the planning strategy for the District and require very substantial new development areas to be identified. Whilst each may bring benefits of particular types they would also have substantial (although currently untested) impacts and provide for much higher levels of in-migration to the District than other scenarios.

8.8 The Government Projection scenario (ONS 2008-based SNPP) assumes a gradual increase in the rate of population and housing growth, as a result of changes in the model controls (from dwellings to population led). This coincides with the current low level of completions, brought about by the recession. Completions would build up to a similar level to the South East Plan trajectory and slightly higher than the Option 1 trajectory. In practice the gap between actual completions and South East Plan/Option 1 requirements from 2006-2011 means that a higher rate of development would be needed post-2011 to achieve the overall SE Plan/Option 1 requirement.

8.9 The Zero Net Migration scenario illustrates the very low level of provision under this scenario, even compared to the recent recessionary level of completions. As concluded above, this level of provision is so low as to be likely to cause substantial problems, not only in terms of housing provision, but also for the local economy and environment (sustainability).

8.10 It is, therefore, concluded that the Government Projection scenario (ONS 2008-based SNPP) of 11,000 dwellings is the most realistic level of housing to plan for over the coming 20 years. However, as noted above, this figure may prove to be slightly high as it does not take account of recent economic trends and the City Council will commission further work to test whether this total should be adjusted.

9 Sub-District Distribution

9.1 It is concluded above that the Government Projection scenario should be adopted at the District-wide level. Although there has been an attempt to apply this scenario to the sub-District level (see Tables 4.3 – 4.8 above) the projections were not designed to be accurate at this level and breaking the projections into sub-areas simply applies District-wide (or larger) trends to small parts of the District. In addition, this does not take account of the particular characteristics of different parts of the District, which have led to the Council identifying 3 spatial areas:

- Winchester Town
- The South Hampshire Urban Areas
- The Market Towns and Rural Area

9.2 Different planning and growth strategies are, or will be, applied to these different areas. For example, a large part of the Market Towns and Rural Area is now within the South Downs National Park, where future planning policies are likely to emphasise conservation. On the other hand, the Partnership for Urban South Hampshire (PUSH) and the recently-established Solent Local Economic Partnership are promoting an economic growth strategy which includes the provision of substantial housing growth. Producing sub-District targets should not, therefore, be simply a matter of dividing the District housing total in proportion to the existing population or geographical size of a particular sub-area. Indeed, the SHMA notes the variety of localised housing markets in operation, especially outside South Hampshire.

9.3 Work on the Core Strategy to date has identified the main urban areas in the District as Winchester and the South Hampshire Urban Areas (Whiteley and West of Waterlooville). The Council has resolved to confirm its support for the updated PUSH economic strategy and to allocate major housing sites at North Whiteley and West of Waterlooville. Consultation on the Core Strategy and the Blueprint exercise has shown general support for these allocations and planning permission has since been granted for 3,000 dwellings at West of Waterlooville (approximately 2,500 within Winchester District).

9.4 It is, therefore, recommended that the South Hampshire Urban Areas continue to be a focus for development within the District and this is also consistent with, and will make a substantial contribution to, the PUSH strategy through the provision of housing, facilities and employment areas. The estimated contribution of this sub-area is 5,500 dwellings over the period 2011-2031 (approximately 3,000 at North Whiteley and 2,500 at West of Waterlooville).

9.5 Winchester Town is the District's main existing urban area and provides the best range of facilities, services, transport connections and a large employment base. It is, therefore, the most sustainable location within the District and is a suitable location for significant levels of housing, although parts of the town and its setting are also constrained by important historic and environmental assets. The Winchester built-up area currently accommodates approximately 37.5% of the District's dwellings stock and 36.4% of the District population. If a similar proportion (37%) of the recommended District housing provision (of 11,000) were allocated to Winchester it would amount to approximately 4,000 dwellings.

9.6 Although there are arguments in favour of Winchester accommodating more than its existing proportion of the District population, due to its sustainability credentials, there were also clear concerns raised through the Core Strategy consultation and Blueprint about the constraints on the town and its setting. To direct a disproportionate level of development to Winchester could be seen to conflict with the emphasis on promoting growth in the PUSH area and also with the presence of the South Downs National Park which extends right to the eastern edge of the town. Accordingly, it is recommended that the Winchester Town sub-area should accommodate approximately 4,000 dwellings, in proportion to its current role within the District.

9.7 The Market Towns and Rural Area, as the name suggests, consists mainly of small towns and villages in a rural setting. This area includes that part of the South Downs National Park which falls within the District, as well as most of the PUSH part of the District. Despite the contrasting strategies for these areas, their character and the issues and concerns they face are very similar. Therefore, they are treated as one large area for the purposes of the spatial strategy for the District.

9.8 The Blueprint exercise illustrated that there is a widespread recognition of the need for some additional housing and economic development in the Market Towns and Rural Area, but also much concern about its scale and impact on the character of the towns and villages. Although none of the settlements in this sub-area have the sustainability credentials of Winchester or the South Hampshire Urban Areas, a settlement strategy has been derived to identify the appropriate level of housing growth for the main rural settlements. This takes account of their size, facilities, connectivity, and needs and has regard to local concerns and potential vulnerability to the loss of services and facilities.

9.9 The settlement strategy proposes a scale and type of development suited to the various types of settlement and this takes into account the responses received through Blueprint and the need to accommodate the remaining 1,500 dwellings required to achieve the District target of 11,000. The settlement strategy proposes that 2 settlements should have a target of 400-500 dwellings each and that a further 6 settlements should have a target of 150-250 dwellings each. This would give a total of 1,700-2,500 dwellings for the main settlements in the market Towns and Rural Area, before taking account of smaller-scale provision in other settlements. The strategy will, therefore, easily meet the target level of provision for this sub-area, although the emphasis here is on responding to local needs.

9.10 The strategy takes account of the sensitivity of those settlements within the National Park and the likely emphasis of the National Park Authority on conservation. Therefore, none of the National Park settlements are designated as main settlements within the proposed strategy. At the same time, present and future residents of the National Park will need housing, jobs and facilities and there are some larger villages which already provide a small-scale focus for these facilities and should continue to do so.

9.11 The proposed strategy is therefore sensitive to the special environment of the National Park, but also seeks to cater for the needs of its residents. The National Park is not identified separately as a spatial area for the Core Strategy and the intention is that the current Winchester District Core Strategy will be jointly adopted. In due course the National Park Authority will produce its own Core Strategy, which will establish separate housing targets.

9.12 Table 9.1 below sets out the recommended distribution of dwellings between the three main sub-areas of the District.

Table 9.1 – RECOMMENDED SPATIAL AREA DWELLING PROVISION

	Winchester Town	**South Hampshire Urban Areas**	**Market Towns and Rural Area**	**District Total**
Total Dwellings	**4,000**	**5,500**	**1,500**	**11,000**

APPENDIX 1 – DETAILED ONS 2008-BASED SNPP PROJECTION WINCHESTER DISTRICT

SUMMARY STATISTICS

	2001	2006	2011	2016	2021	2026	2031
Dwellings	44,420	47,079	49,292	51,186	54,205	57,338	60,298
Population	107,220	112,924	117,038	119,200	124,000	129,100	133,600

POPULATION BY AGE

	2001	2006	2011	2016	2021	2026	2031
0-4	5,725	5,928	6,423	6,142	6,424	6,661	6,724
5-15	14,235	15,043	15,107	15,412	16,006	16,449	16,928
16-29	18,398	19,389	20,595	20,812	20,841	21,063	21,515
30-44	22,883	23,268	21,914	20,573	21,526	23,287	23,824
45-64	27,576	29,555	31,147	31,334	31,864	31,460	31,199
65-74	9,323	9,590	10,762	12,592	12,964	12,993	14,332
75-84	6,419	6,989	7,405	8,009	9,266	11,039	11,504
85+	2,661	3,162	3,685	4,326	5,109	6,148	7,574
All Ages	107,220	112,924	117,038	119,200	124,000	129,100	133,600

ECONOMICALLY ACTIVE POPULATION

	2001	2006	2011	2016	2021	2026	2031
EA Pop	54,867	57,780	59,443	59,909	61,596	64,205	65,990

HOUSEHOLD TYPE

	Married couple hhlds	Lone parent hhld	One person hhlds	Cohabiting couple hhlds	Other hhlds Old	Total heads	Private hhld Pop
2001	23,337	1,828	12,081	3,371	2,532	43,149	101,417
2006	22,970	2,025	13,780	4,203	2,736	45,714	107,121
2011	22,625	2,077	15,306	4,947	2,939	47,894	111,281
2016	21,989	2,107	17,021	5,565	3,088	49,770	113,492
2021	22,009	2,187	19,055	6,200	3,258	52,709	118,300
2026	22,229	2,278	21,167	6,694	3,382	55,750	123,400
2031	22,387	2,361	23,229	7,115	3,536	58,628	127,908

WINCHESTER DISTRICT POPULATION AND DWELLING CHANGE

Period	2001-06	2006-11	**2011-16**	**2016-21**	**2021-26**	**2026-31**	**TOTAL 2011-31**
Population Total	5,704	4,114	**2,162**	**4,800**	**5,100**	**4,500**	**16,562**
Natural Change	207	798	543	665	659	312	2,179
Net Migration	5,497	3,316	1,619	4,135	4,441	4,188	14,383
Dwellings	2,659	2,213	**1,894**	**3,019**	**3,133**	**2,960**	**11,006**
Econ. Active	2,913	1,663	**466**	**1,687**	**2,609**	**1,785**	**6,547**

APPENDIX 2 – DETAILED ONS 2008-BASED SNPP PROJECTION PUSH AREA

SUMMARY STATISTICS

	2011	2016	2021	2026	2031
Dwellings	15,050	15,600	16,550	17,500	18,400
Population	36,550	37,200	38,700	40,250	41,600

POPULATION BY AGE

	2011	2016	2021	2026	2031
0-4	2,000	1,900	2,000	2,050	2,100
5-15	5,000	5,100	5,250	5,400	5,550
16-29	5,350	5,450	5,450	5,500	5,650
30-44	6,750	6,350	6,650	7,200	7,350
45-64	10,600	10,650	10,850	10,700	10,600
65-74	3,600	4,150	4,250	4,250	4,700
75-84	2,200	2,350	2,750	3,300	3,450
85+	1,050	1,250	1,500	1,800	2,250
All Ages	36,550	37,200	38,700	40,250	41,600

ECONOMICALLY ACTIVE POPULATION

	2011	2016	2021	2026	2031
EA Pop	18,500	18,650	19,200	20,050	20,600

HOUSEHOLD TYPE

	Married couple hhlds	Lone parent hhld	One person hhlds	Cohabiting couple hhlds	Other hhlds Old	Total heads
2011	6,900	650	4,650	1,500	900	14,600
2016	6,700	650	5,200	1,700	950	15,200
2021	6,700	650	5,800	1,900	1,000	16,100
2026	6,800	700	6,450	2,050	1,050	17,000
2031	6,850	700	7,100	2,150	1,100	17,900

APPENDIX 3 – DETAILED ONS 2008-BASED SNPP PROJECTION SOUTH DOWNS NATIONAL PARK AREA

POPULATION BY AGE

	2011	2016	2021	2026	2031
0-4	550	500	550	550	550
5-15	1,550	1,550	1,650	1,650	1,700
16-29	1,700	1,700	1,700	1,750	1,800
30-44	1,900	1,800	1,900	2,050	2,100
45-64	3,750	3,750	3,800	3,800	3,750
65-74	1,200	1,350	1,400	1,400	1,550
75-84	800	900	1,000	1,200	1,250
85+	450	500	550	700	850
All Ages	11,850	12,050	12,550	13,100	13,550

ECONOMICALLY ACTIVE POPULATION

	2011	2016	2021	2026	2031
EA Pop	5,900	6,000	6,150	6,450	6,650

HOUSEHOLD TYPE

	Married couple hhlds	Lone parent hhld	One person hhlds	Cohabiting couple hhlds	Other hhlds Old	Total heads
2011	2,300	200	1,550	500	300	4,900
2016	2,250	200	1,750	550	300	5,100
2021	2,250	200	1,950	650	350	5,400
2026	2,250	250	2,150	700	350	5,700
2031	2,300	250	2,350	750	350	6,000

APPENDIX 4 – ZERO NET MIGRATION PROJECTION WINCHESTER DISTRICT

POPULATION BY AGE

Winchester	2001	2006	2011	2016	2021	2026	2031
0-4	5,725	5,928	6,356	5,898	5,709	5,555	5,352
5-15	14,235	15,043	15,035	15,113	14,985	14,465	14,035
16-29	18,398	19,389	20,299	19,976	19,241	18,851	18,601
30-44	22,883	23,268	21,693	19,792	19,256	19,441	18,898
45-64	27,576	29,555	31,042	30,938	30,556	28,986	27,303
65-74	9,323	9,590	10,737	12,493	12,639	12,359	13,272
75-84	6,419	6,989	7,388	7,946	9,065	10,607	10,807
85+	2,661	3,162	3,678	4,289	4,992	5,892	7,121
All Ages	107,220	112,924	116,228	116,445	116,443	116,156	115,389

SUMMARY

Winchester	2001	2006	2011	2016	2021	2026	2031
Dwellings	44,420	47,079	48,980	50,094	51,118	51,943	52,543
Population	107,220	112,924	116,228	116,445	116,443	116,156	115,389
Ec. Active	54,850	57,800	58,950	58,250	57,250	57,000	55,950

HOUSEHOLD BY TYPE

	Married couple hhlds	Lone parent hhld	One person hhlds	Cohabiting couple hhlds	Other hhlds	Total heads	Private hhld Pop
2001	23,350	1,850	12,100	3,350	2,550	43,150	101,400
2006	22,950	2,050	13,800	4,200	2,750	45,700	107,100
2011	22,500	2,050	15,250	4,900	2,900	47,600	110,450
2016	21,600	2,050	16,700	5,350	3,000	48,700	110,750
2021	20,900	2,000	18,100	5,650	3,050	49,700	110,750
2026	20,300	1,950	19,450	5,800	3,000	50,500	110,450
2031	19,650	1,900	20,600	5,900	3,050	51,100	109,700

CHANGE

	2001-06	2006-11	2011-16	2016-21	2021-26	2026-31	TOTAL 2011-31
Dwellings	2,659	1,901	1,114	1,024	825	600	3,563
Population	5,704	3,304	217	-2	-287	-767	-839
Econ. Active	2,900	1,150	-700	-1,000	-250	-1,000	-2,950