

Report for:

**New Forest
District Council**

**Demographic
Projections**

Final Report

July 2017

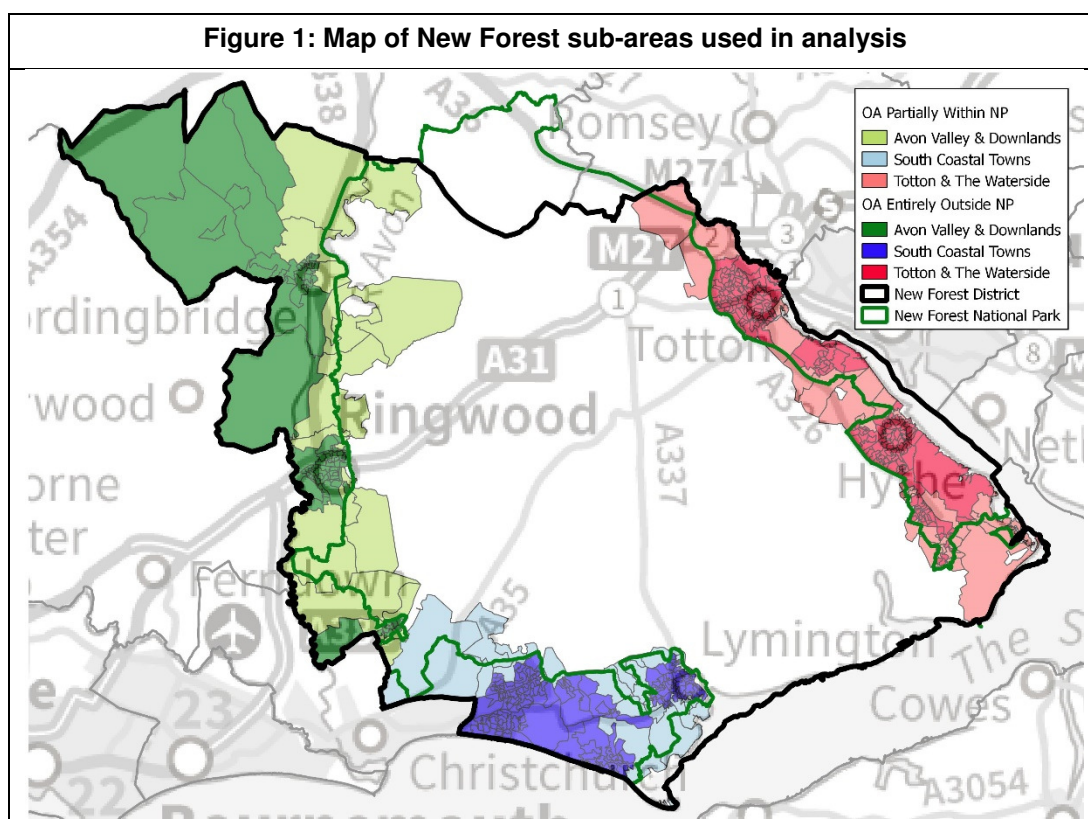
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Summary

Introduction

1. Justin Gardner Consulting (JGC) have been commissioned by New Forest District Council to develop a series of demographic projections for each of three geographic sub-areas of the New Forest district comprising the local plan area outside of the New Forest National Park. The study also reviews the projected growth in the older population of the area, and the likely future need for housing and other forms of sheltered or care accommodation for older people.
2. The map below shows the geographical extent of the study area and the three sub-areas within the planning authority area. For clarity, the three sub-areas used in analysis are:
 - Avon Valley & Downlands
 - South Coastal Towns
 - Totton & the Waterside



Population Trends

3. Analysis of past trend data reveals that the population of the New Forest (planning authority area) has grown fairly modestly over the past decade (2005-15); over this period the population grew by 4.4%, compared with 9% regionally and 8% nationally. The South Coastal Towns sub-area saw stronger population growth than other areas, increasing by 7.4% over the decade.

4. Population growth in the district is largely driven by net in-migration; the district consistently seeing a negative level of natural change (i.e. more deaths than births). The negative natural change is driven by the older age structure in the area, which saw 27% of the population aged 65 and over in 2015 (in the planning authority area) – this proportion is substantially above that seen in either the South East (19%) or England (18%). The age profile of the South Coastal Towns is particularly 'old', with 36% of the population being aged 65 and over.
5. Further analysis shows that the older person population has grown substantially over the decade to 2015; the population aged 65 and over increasing by 23%, against a backdrop where total population growth was only 4.4%

New Forest Demographic Projections

6. The main analysis in this report was to develop a series of projections linked to different assumptions. Three projections were developed, two based on demographic-trends and one linking to the Council's housing trajectory. For all of these projections a full set out outputs around population growth, age structure, the components of population change, household growth and housing need has been provided. The projections covered the period from 2016 to 2036.
7. The first projection linked to the assumptions in the 2014-based subnational population projections (SNPP). It was observed that ONS are projecting for population growth to be somewhat above past trends, with assumptions about future migration also being higher than has typically been observed in the past. Overall, this scenario (PROJECTION 1A) showed population growth of 18,900 people across the district (excluding the National Park) and 11,700 additional households (which would translate into a need for 601 additional dwellings each year). Population and household growth was projected to be particularly strong in the Totton & the Waterside area.
8. The second projection (PROJECTION 1B), looked at past trends in population growth (2005-15) and modelled data on the assumption that these average trends would be repeated in the future. This projection shows a more modest increase in the population and a greater focus on population growth in the South Coastal Towns sub-area. In terms households, this projection suggested a more even split of growth and housing need (relative to the current number of households in each area). Overall, this scenario suggested a need for around 483 dwellings per annum.
9. The final projection (PROJECTION 2) used information from the Council's housing trajectory to model what level of population growth might occur if housing delivery comes forward as expected. Across the planning authority area, this projection sees population growth somewhere in-between that shown by the two trend-based projections, but with some notable year-on-year variations. Overall, this scenario projects a population growth of around 14,900 people, with housing delivery of around 10,600 dwellings, or 530 dwellings per annum.
10. The figure and table below show a) a comparison of the population growth in each of the scenarios (plus a past trend analysis) and b) estimates of the housing need associated with each scenario and by sub-area. Figures are all for the New Forest planning authority area (i.e. excluding that part of the district that falls in the National Park).

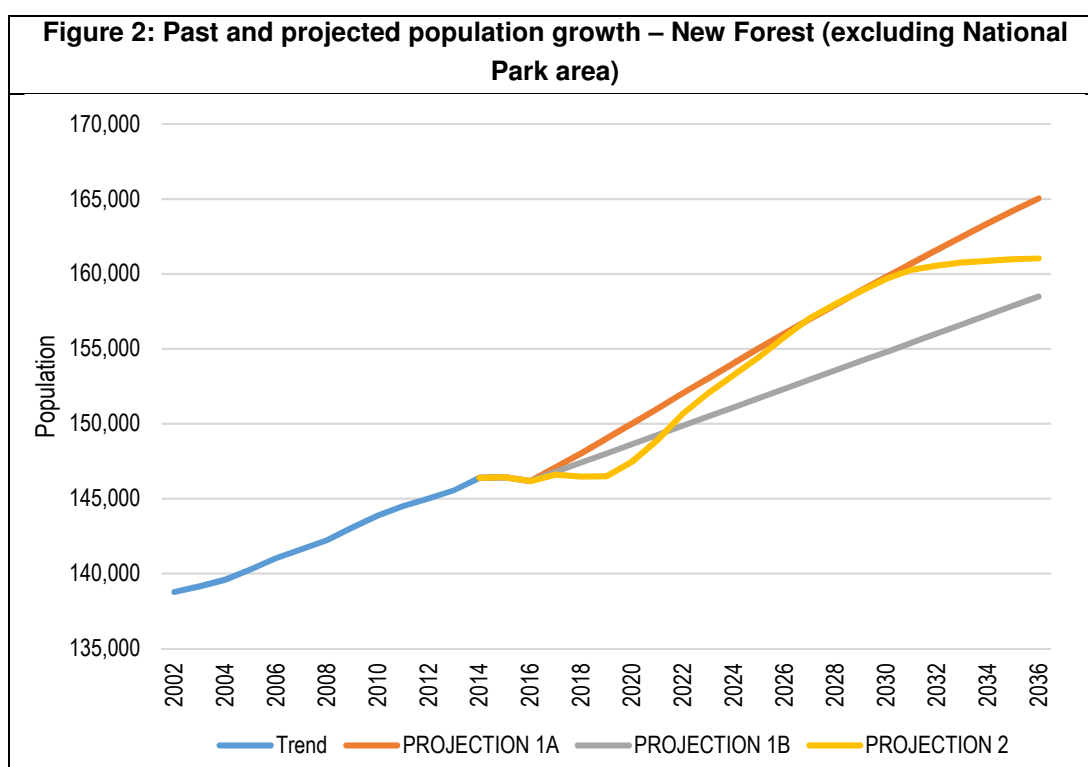


Figure 3: Annual housing need with different scenarios by sub-area (2016-36)

	PROJECTION 1A	PROJECTION 1B	PROJECTION 2
Avon Valley & Downlands	132	87	143
South Coastal Towns	58	169	119
Totton & the Waterside	411	227	267
New Forest (ex. NP)	601	483	530

Source: Demographic projections

Older Persons Housing Needs

11. The final section of the report has looked at the potential need for specialist housing for older people. This analysis updates information provided in the 2014 Strategic Housing Market Assessment (SHMA).
12. The older person population of the New Forest is proportionately larger than in a range of comparator area (Hampshire, the South East and England), with a particular concentration in older age groups (aged 75+) and the South Coastal Towns sub-area. The older person population is also projected to increase notably in the future, although increases are projected to be of a lesser scale than in other areas (partly linked to the New Forest already having a larger older person population).

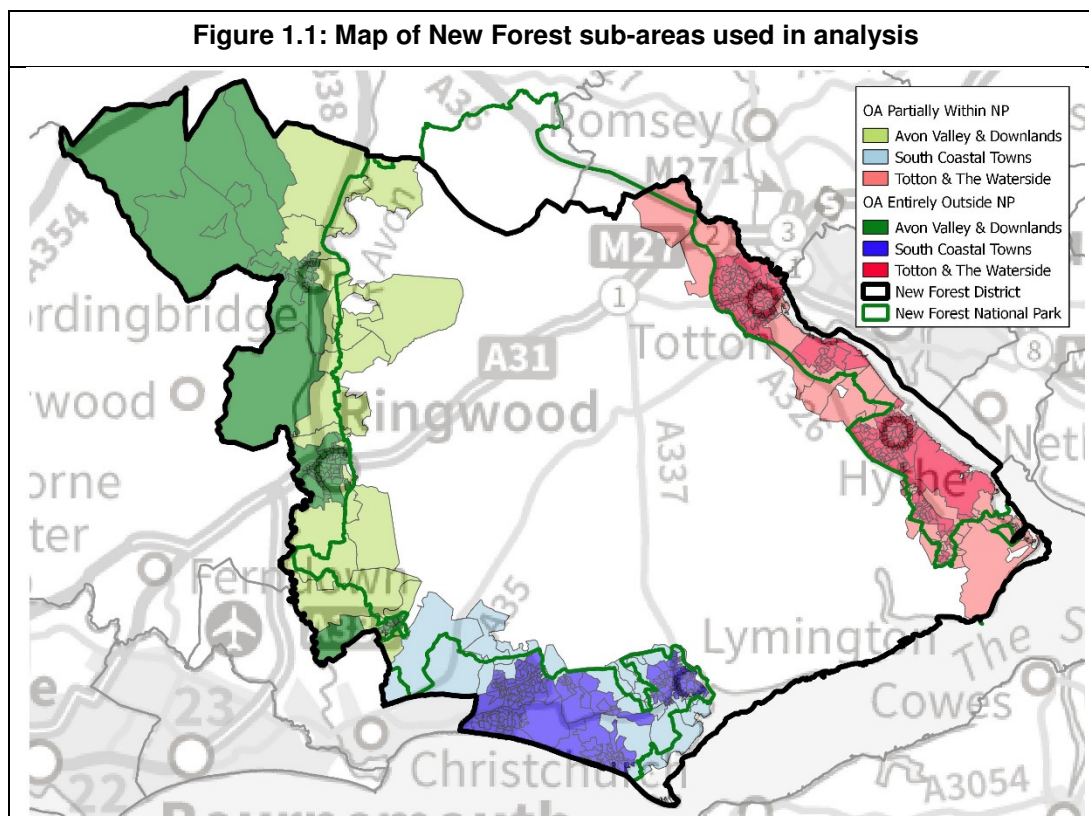
13. The main analysis focussed on looking at future need for specialist housing (sheltered/extra-care) linked to the projections developed in this report. Using assumptions from the Housing and Learning Information Network (Housing LIN) it was estimated that there is a need for 2,175 additional units of older person specialist accommodation (in a C3 use class) in the 2016-36 period, along with 970 registered care bedspaces (C2 use class) – the first of these figures represents around a fifth of the housing being proposed through the housing trajectory.

Figure 4: Projected need for specialist housing for older persons by sub-area (2016-36)				
	Avon Valley & Downlands	South Coastal Towns	Totton & the Waterside	New Forest (ex. NP)
Sheltered – affordable	156	202	361	719
Sheltered – market	246	318	570	1,134
Extra-care – affordable	44	56	101	201
Extra-care – market	26	34	61	121
Total (ex. Reg. care)	472	610	1,093	2,175
Registered care	203	342	425	970
TOTAL	675	952	1,519	3,146

Source: Demographic projections and Housing LIN

1. Introduction

- 1.1 Justin Gardner Consulting (JGC) have been commissioned by New Forest District Council to develop a series of demographic projections for each of three geographic sub-areas of the New Forest district comprising the local plan area outside of the New Forest National Park. The study also reviews the projected growth in the older population of the area, and the likely future need for housing and other forms of sheltered or care accommodation for older people.
- 1.2 Two main types of projection have been developed, the first being based on trend data using then latest information from the Office for National Statistics (ONS) and the second based on the proposed submission draft local plan housing target (and the phasing of this target). As will be seen in the analysis to follow, two 'trend-based' projections have been developed, along with one linked to the housing trajectory.
- 1.3 All projections have been developed for the period 2016-2036, to be consistent with the emerging Local Plan. Full spreadsheets of data have been provided to the Council with detailed information for each year and by sex/single year-of-age. This report contains key outputs from the projections, including:
- Age and sex breakdowns
 - Estimates of the components of population change (i.e. migration and natural change (births minus deaths))
 - Estimated household growth and dwelling need (linked to the trend-based projections)
 - Data separately for each of the three sub-areas (as well as indicative information for the National Park part of the District in the case of trend-based projections)
- 1.4 The map below shows the geographical extent of the study area and the three sub-areas within the planning authority area. The map also shows the full extent of the National Park and Census Output Areas (OAs) that are either partially or fully within the sub-areas. One of the difficulties in studying National Parks is that the geographies do not align to standard statistical areas. Hence some detailed mapping was undertaken to consider the relationship between OAs and the three sub-areas, with a further estimate of the proportion of the population in 'partial' OAs being developed to enable estimates of population (and other characteristics) to be developed at a sub-area level.
- 1.5 It is considered that this method should provide a reasonably accurate view of the population profile in each area. To assist with this, the OA analysis has also ensured a consistency between ONS mid-year population estimates (MYE) for both the New Forest District and the New Forest National Park (including looking at OAs outside of the District boundary). Hence all trend data has been consolidated to published data to ensure a consistency of approach across locations.



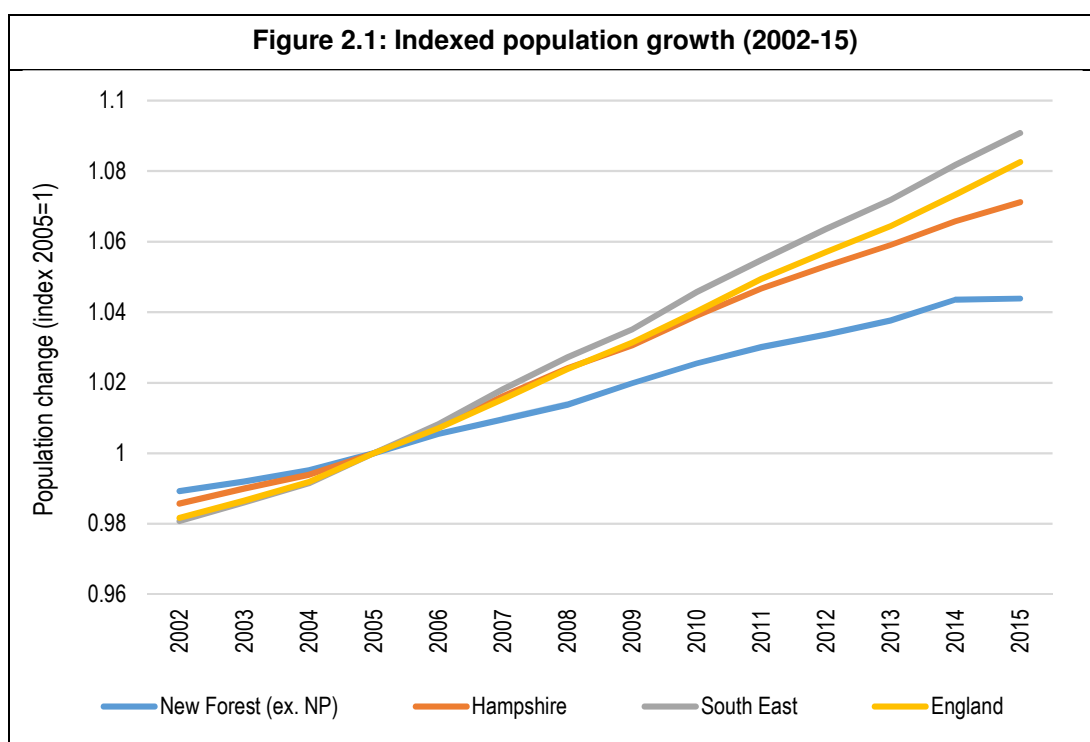
2. Population Trends

Introduction

- 2.1 This section looks at a series of trend-based data about past population growth (split into the three sub-areas). Some of this data is then taken forward into the projections. As will be seen, some data is only available at a local authority level and this does add to the degree of assumption needing to be made when looking at developing analysis for smaller areas.

Overall population change

- 2.2 The analysis below looks at population change in the period back to 2002. This date is chosen as it is the earliest date for which ONS have published MYE for OAs – population data for 2001 is available for OAs from the 2001 Census, but this data is not a 'mid-year' figure and therefore not strictly comparable. Whilst data is available from 2002, much of the analysis focusses on trends over the past 10-years (2005-15); this is due to a 10-year period having become an 'industry-standard' when looking at population trends.
- 2.3 The figure below shows population growth in the New Forest (excluding the National Park) and a range of comparator areas. This analysis shows that since 2005, New Forest (ex. NP) has seen more modest population growth than other areas, population increasing by 4%, compared with 7% across Hampshire, 9% in the South East and 8% nationally.



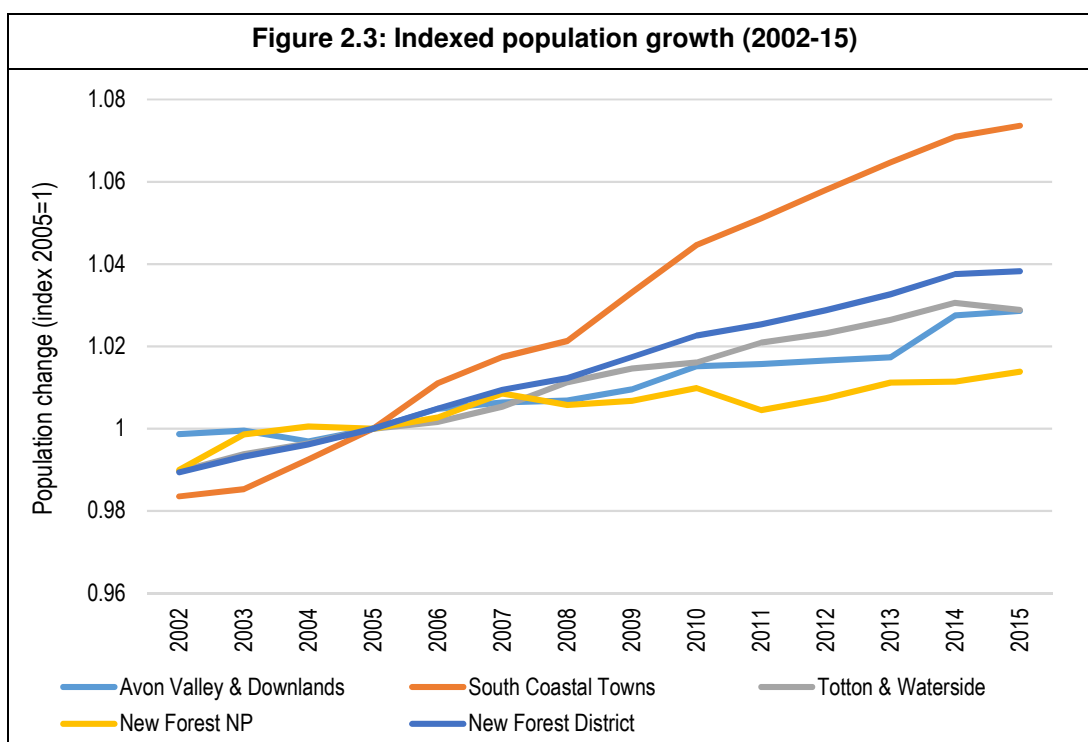
Source: ONS

- 2.4 The table below shows the actual population figures used in the analysis – this also includes data for each of the three sub-areas and focusses on the 10-year period to 2015. The analysis shows that population growth was strongest in the South Coastal Towns sub-area (increasing by over 7%); this compares with population growth of less than 3% in each of Avon Valley & Downlands and Totton & the Waterside, and growth of just 1.4% in the National Park area of the New Forest District.

Figure 2.2: Population growth (2005-15)				
	2005	2015	Change	% change
Avon Valley & Downlands	26,406	27,161	755	2.9%
South Coastal Towns	47,213	50,689	3,476	7.4%
Totton & the Waterside	66,663	68,588	1,924	2.9%
New Forest (ex. NP)	140,282	146,438	6,155	4.4%
New Forest NP	32,141	32,586	445	1.4%
District total	172,423	179,023	6,600	3.8%
Hampshire	1,263,075	1,353,043	89,968	7.1%
South East	8,202,896	8,947,913	745,017	9.1%
England	50,606,034	54,786,327	4,180,293	8.3%

Source: ONS

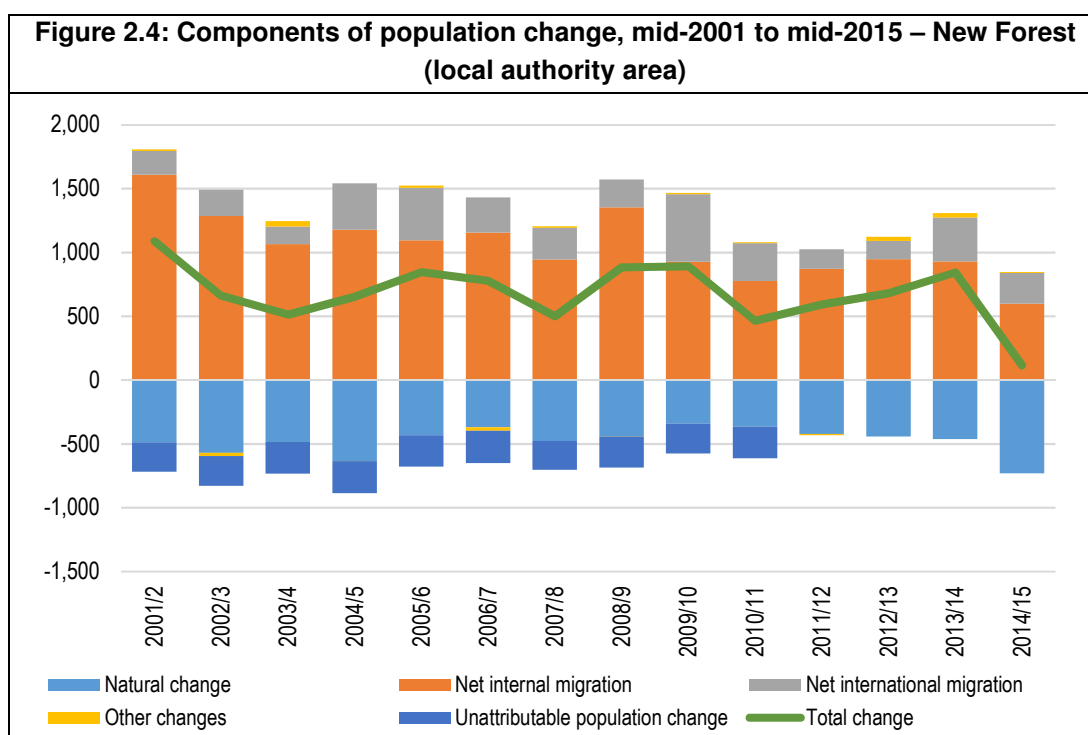
- 2.5 The figure below shows the indexed population growth in each area of the New Forest. This again shows that the South Coastal Towns area has seen substantially stronger growth than other parts of the District.



Source: ONS

Components of past population change

- 2.6 The figure and table below consider the drivers of population change in New Forest District from 2001 to 2015. This information (from ONS) is only readily available for the whole District (including the National Park area).
- 2.7 Population change is largely driven by natural change (births minus deaths) and migration although within ONS data there is also a small other changes category (mainly related to armed forces and prison populations) and an unattributable population change (UPC) – this is an adjustment made by ONS to mid-year population estimates where Census data has suggested that population growth had either been over- or under-estimated in the inter-Census years. Because UPC links back to Census data a figure is only provided for years up to 2011.
- 2.8 The figure shows in New Forest that net migration has been the key driver of population change. Throughout the period studied, the number of deaths exceeded the number of births. Over the full 2001-15 period, the number of births was (on average) 480 lower than the number of deaths each year. When looking at migration, the data shows an average level of net migration of about 1,320 people per annum (with about 1,050 of this being internal migration (i.e. net moves from another part of the Country). Levels of migration have generally been lower over the past five years; in the 2010-15 period, net migration averaged 1,060 people per annum, with a figure of 1,250 if looking at the past 10-years (2005-15).
- 2.9 Other changes are quite small and the data also shows a negative level of UPC. This latter finding would suggest that ONS may have previously over-estimated migration and population growth in New Forest.



Source: ONS

Figure 2.5: Components of population change, mid-2005 to mid-2015 – New Forest (local authority area)

Year	Natural change	Net internal migration	Net international migration	Other changes	Other (unattributable)	Total change
2001/2	-489	1,608	187	12	-229	1,089
2002/3	-572	1,286	205	-23	-235	661
2003/4	-486	1,064	139	43	-247	513
2004/5	-635	1,178	364	-1	-252	654
2005/6	-432	1,094	411	19	-246	846
2006/7	-370	1,154	277	-28	-254	779
2007/8	-478	944	248	13	-227	500
2008/9	-443	1,353	218	-1	-243	884
2009/10	-343	926	531	10	-233	891
2010/11	-366	775	297	7	-247	466
2011/12	-424	871	154	-8	0	593
2012/13	-443	947	144	32	0	680
2013/14	-462	930	342	35	0	845
2014/15	-731	599	241	7	0	116

Source: ONS

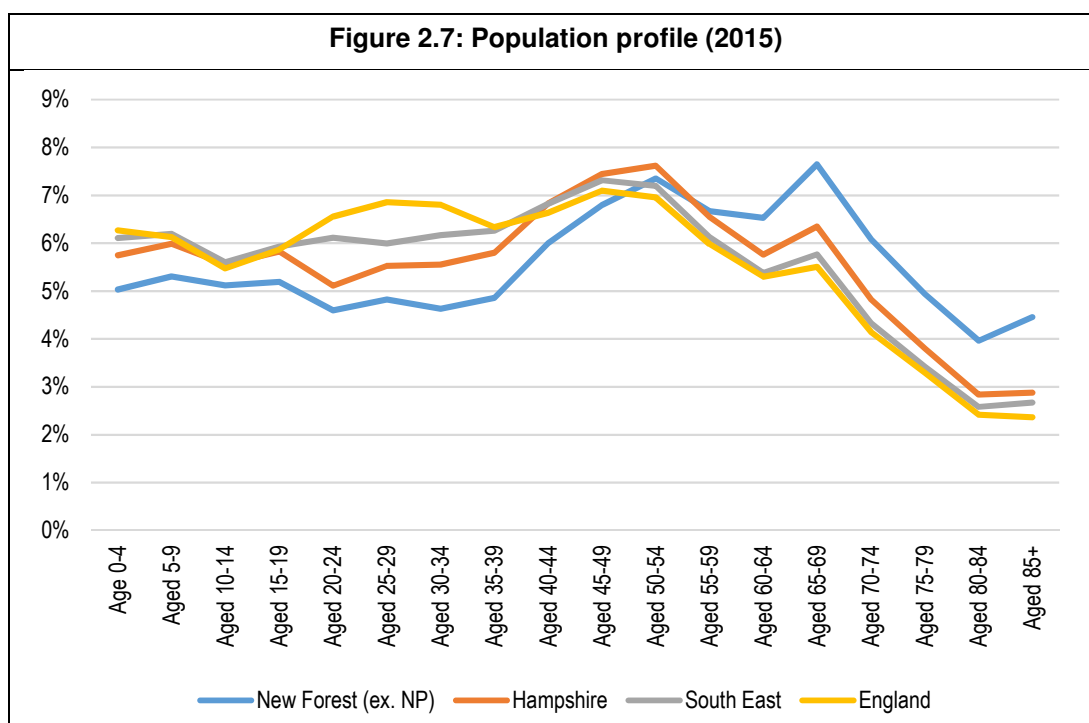
Population age structure

- 2.10 The table below shows the population profile of New Forest (ex. NP) in five-year age bands compared with a range of other areas. The data shows a relatively old age structure with particularly notable differences from ages 60 onwards.

Figure 2.6: Population profile (2015)					
	New Forest (ex. NP)		Hampshire	South East	England
	Population	% of population	% of population	% of population	% of population
Age 0-4	7,370	5.0%	5.7%	6.1%	6.3%
Aged 5-9	7,775	5.3%	6.0%	6.2%	6.1%
Aged 10-14	7,493	5.1%	5.6%	5.6%	5.5%
Aged 15-19	7,603	5.2%	5.8%	5.9%	5.9%
Aged 20-24	6,730	4.6%	5.1%	6.1%	6.6%
Aged 25-29	7,065	4.8%	5.5%	6.0%	6.9%
Aged 30-34	6,778	4.6%	5.6%	6.2%	6.8%
Aged 35-39	7,119	4.9%	5.8%	6.3%	6.3%
Aged 40-44	8,786	6.0%	6.8%	6.8%	6.6%
Aged 45-49	9,952	6.8%	7.4%	7.3%	7.1%
Aged 50-54	10,764	7.4%	7.6%	7.2%	7.0%
Aged 55-59	9,769	6.7%	6.6%	6.1%	6.0%
Aged 60-64	9,560	6.5%	5.8%	5.4%	5.3%
Aged 65-69	11,202	7.6%	6.4%	5.8%	5.5%
Aged 70-74	8,906	6.1%	4.8%	4.3%	4.1%
Aged 75-79	7,233	4.9%	3.8%	3.4%	3.3%
Aged 80-84	5,806	4.0%	2.8%	2.6%	2.4%
Aged 85+	6,525	4.5%	2.9%	2.7%	2.4%
All Ages	146,437	100.0%	100.0%	100.0%	100.0%

Source: ONS mid-year population estimates

- 2.11 The differences between New Forest and other areas can more clearly be seen in the figure below. This identifies a relatively low proportion of the population aged about 20 to 39 and higher proportions for all age bands from about 60 upward.



Source: ONS mid-year population estimates

- 2.12 The analysis below summarises the above information by assigning population to three broad age groups (which can generally be described as a) children, b) working-age and c) pensionable age. This analysis shows that New Forest (ex. NP) has a relatively high proportion of people aged 65 and over (27%) and consequently lower proportions of both children and people of working-age.

Figure 2.8: Population profile (2015) – summary age bands					
	New Forest (ex. NP)		Hampshire	South East	England
	Population	% of population	% of population	% of population	% of population
Age under 16	24,131	16.5%	18.4%	19.0%	19.0%
Aged 16-64	82,635	56.4%	60.9%	62.2%	63.3%
Aged 65+	39,672	27.1%	20.7%	18.8%	17.7%
All Ages	146,437	100.0%	100.0%	100.0%	100.0%

Source: ONS mid-year population estimates

- 2.13 The table below shows the same information for each of the three sub-areas (plus the National Park area of the District). This shows clear differences between the different locations, with the South Coastal Towns having a substantially older age structure than any of the other areas (including the National Park). The youngest age structure can be seen in Totton & the Waterside, although the population profile in this area is still relatively old in comparison with other areas (e.g. regionally and nationally).

Figure 2.9: Population profile (2015) – summary age bands

	Avon Valley & Downlands	South Coastal Towns	Totton & the Waterside	New Forest (ex. NP)	New Forest NP	District total
Age under 16	17.9%	13.6%	18.1%	16.5%	14.2%	16.1%
Aged 16-64	56.8%	50.8%	60.5%	56.4%	55.7%	56.3%
Aged 65+	25.3%	35.7%	21.5%	27.1%	30.0%	27.6%
All Ages	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: ONS mid-year population estimates

Age structure changes

- 2.14 The table and figure below show population change by age (again for the 2005-15 period). This generally identifies the greatest increases to be in older age groups (aged 65 and over) along with some notable population declines (particularly in the 30-44 age group).

Figure 2.10: Population change by age (2005-15) – 5-year age bands (New Forest (ex. NP))

	Population (2005)	Population (2015)	Change	% change
Age 0-4	6,659	7,370	711	10.7%
Aged 5-9	7,725	7,775	50	0.6%
Aged 10-14	8,600	7,493	-1,107	-12.9%
Aged 15-19	8,194	7,603	-591	-7.2%
Aged 20-24	5,954	6,730	776	13.0%
Aged 25-29	6,133	7,065	932	15.2%
Aged 30-34	7,605	6,778	-827	-10.9%
Aged 35-39	9,431	7,119	-2,312	-24.5%
Aged 40-44	10,375	8,786	-1,588	-15.3%
Aged 45-49	9,406	9,952	546	5.8%
Aged 50-54	9,015	10,764	1,749	19.4%
Aged 55-59	10,212	9,769	-443	-4.3%
Aged 60-64	8,682	9,560	879	10.1%
Aged 65-69	7,897	11,202	3,305	41.8%
Aged 70-74	7,467	8,906	1,439	19.3%
Aged 75-79	6,647	7,233	585	8.8%
Aged 80-84	5,666	5,806	140	2.5%
Aged 85+	4,613	6,525	1,912	41.4%
All Ages	140,282	146,437	6,155	4.4%

Source: ONS mid-year population estimates

- 2.15 This information has again been summarised into three broad age bands to ease comparison. The table below shows a decrease in the number of children living in the District (reducing by about 3%) along with a modest decrease in the 'working-age' population. The key driver of population growth has therefore been in the 65 and over age group, which between 2005 and 2015 saw a population increase of about 7,400 people; this age group increasing in size by 23% over the decade.

Figure 2.11: Change in population by broad age group (2005-15) – New Forest (ex. NP)				
	2005 population	2015 population	Change	% change
Under 16	24,758	24,131	-627	-2.5%
16-64	83,233	82,635	-598	-0.7%
65+	32,291	39,671	7,380	22.9%
TOTAL	140,282	146,437	6,155	4.4%

Source: ONS mid-year population estimates

- 2.16 The series of tables below shows the same information for each of the three sub-areas, plus the National Park area of the New Forest District and an overall District-wide change in the population structure. All areas see a notable increase in the population aged 65 and over, and with the exception of the South Coastal Towns, a decline in the population aged 16-64 has been observed. The difference between the South Coastal Towns and other areas looks to have been driven by the overall higher level of population growth observed by ONS in their MYE.

Figure 2.12: Change in population by broad age group (2005-15) – Avon Valley & Downlands				
	2005 population	2015 population	Change	% change
Under 16	4,804	4,855	50	1.0%
16-64	15,886	15,421	-465	-2.9%
65+	5,715	6,885	1,169	20.5%
TOTAL	26,406	27,161	755	2.9%

Source: ONS mid-year population estimates

Figure 2.13: Change in population by broad age group (2005-15) – South Coastal Towns				
	2005 population	2015 population	Change	% change
Under 16	6,890	6,877	-14	-0.2%
16-64	24,979	25,739	760	3.0%
65+	15,344	18,073	2,729	17.8%
TOTAL	47,213	50,689	3,476	7.4%

Source: ONS mid-year population estimates

Figure 2.14: Change in population by broad age group (2005-15) – Totton & the Waterside				
	2005 population	2015 population	Change	% change
Under 16	13,063	12,400	-663	-5.1%
16-64	42,368	41,474	-894	-2.1%
65+	11,232	14,714	3,482	31.0%
TOTAL	66,663	68,588	1,924	2.9%

Source: ONS mid-year population estimates

Figure 2.15: Change in population by broad age group (2005-15) – New Forest NP

	2005 population	2015 population	Change	% change
Under 16	5,035	4,637	-398	-7.9%
16-64	19,313	18,165	-1,148	-5.9%
65+	7,793	9,783	1,991	25.5%
TOTAL	32,141	32,586	445	1.4%

Source: ONS mid-year population estimates

Figure 2.16: Change in population by broad age group (2005-15) – New Forest District

	2005 population	2015 population	Change	% change
Under 16	29,793	28,768	-1,025	-3.4%
16-64	102,546	100,800	-1,746	-1.7%
65+	40,084	49,455	9,371	23.4%
TOTAL	172,423	179,023	6,600	3.8%

Source: ONS mid-year population estimates

Past household growth

- 2.17 The final analysis looks at changes in the number of households in each area. Unlike with the population data, ONS do not provide annual figures that can be split down into smaller sub-areas. Hence the analysis looks at changes of the decade between the 2001 and 2011 Census. Again a comparison has been made with other areas.
- 2.18 The analysis shows that between 2001 and 2011, the number of households in the New Forest (ex. NP) increased by around 4,500 – this is a 7.7% increase. This level of increase is slightly lower than observed in other areas, although the difference between locations is less stark than the comparisons for population growth (albeit the analysis has studied a different period).
- 2.19 At a smaller area level, the analysis shows the strongest household growth to have been in the South Coastal Towns (8.7%) and the lowest in Avon Valley & Downlands (5.1%). The National Park area of the New Forest however saw even more modest household growth; the number of households shown to have increased by just 2.6% of the decade.

Figure 2.17: Change in number of households (2001-11)				
	2001 households	2011 households	Change	% change
Avon Valley & Downlands	10,846	11,395	549	5.1%
South Coastal Towns	21,453	23,328	1,875	8.7%
Totton & the Waterside	26,465	28,559	2,094	7.9%
New Forest (ex. NP)	58,764	63,282	4,518	7.7%
New Forest NP	13,208	13,557	349	2.6%
New Forest total	71,972	76,839	4,867	6.8%
Hampshire	502,706	545,254	42,548	8.5%
South East	3,287,489	3,555,463	267,974	8.2%
England	20,451,427	22,063,368	1,611,941	7.9%

Source: 2001 and 2011 Census

Summary

- 2.20 Analysis of past trend data reveals that the population of the New Forest (planning authority area) has grown fairly modestly over the past decade (2005-15); over this period the population grew by 4.4%, compared with 9% regionally and 8% nationally. The South Coastal Towns sub-area saw stronger population growth than other areas, increasing by 7.4% over the decade.
- 2.21 Population growth in the district is largely driven by net in-migration; the district consistently seeing a negative level of natural change (i.e. more deaths than births). The negative natural change is driven by the older age structure in the area, which saw 27% of the population aged 65 and over in 2015 (in the planning authority area) – this proportion is substantially above that seen in either the South East (19%) or England (18%). The age profile of the South Coastal Towns is particularly 'old', with 36% of the population being aged 65 and over.
- 2.22 Further analysis shows that the older person population has grown substantially over the decade to 2015; the population aged 65 and over increasing by 23%, against a backdrop where total population growth was only 4.4%

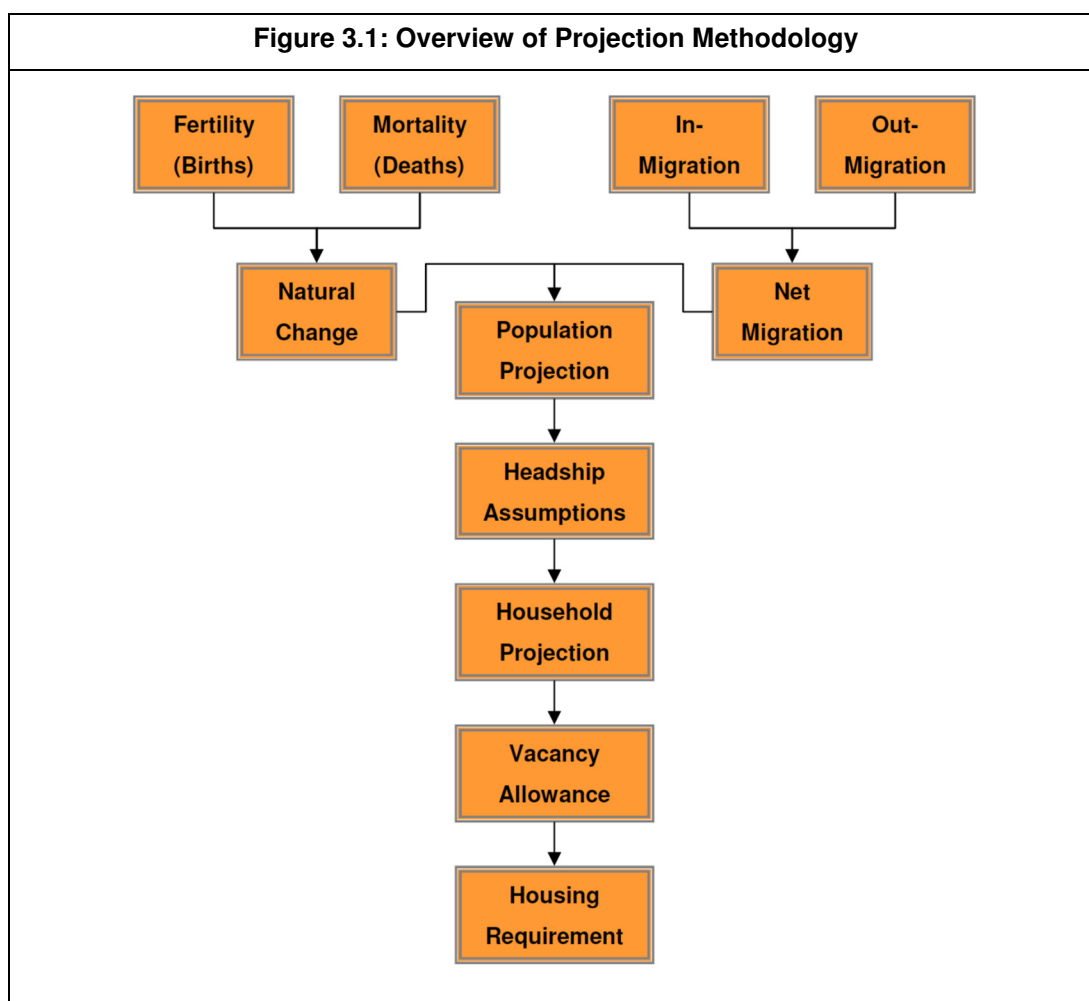
3. New Forest Demographic Projections

Introduction

- 3.1 As part of this assessment a number of projections to assess how the population might change under different assumptions have been run. Three core projections have been developed (two based on demographic trends and one based on linking population growth to a housing trajectory. Core outputs from these projections are provided in this section with a summary of the projections being listed below – more detailed information has been provided to the Council in spreadsheet form:
- PROJECTION 1A (Demographic-based – linked to the latest (2014-based) subnational population projections (SNPP) and 2014-based CLG household projections);
 - PROJECTION 1B (Demographic-based – linked to population growth trends in the 10-year period from 2005-15); and
 - PROJECTION 2 (Housing Trajectory – based on a phased housing trajectory distributed by sub-area)
- 3.2 Two different trend-based projections have been run as it is difficult to provide an accurate sub-area projection in the absence of information about past components of population change (particularly migration). Hence Projection 1A assumes the migration rates in the SNPP (suitably adjusted for age structure differences) with Projection 1B linking to the actual level of population growth seen in the past.
- 3.3 As will be seen, the trend-based assumptions used can have a significant impact on the outputs; this is particularly the case in the South Coastal Towns where the older age structure leads to lower levels of population growth (due to the excess of births over deaths) but where this area has seen the strongest growth over the past 10-years. The two trend-based projections should therefore be viewed as a range although for the purposes of this study it is considered that the housing trajectory projection should be the main projection used when assessing the study outputs.

Methodology

- 3.4 The methodology used to determine population and household growth is based on a fairly standard population projection methodology consistent with the methodology used by ONS and CLG in their population and household projections. Essentially the method establishes the current population and how will this change in the period from 2016 to 2036. This requires working out how likely it is that women will give birth (the fertility rate); how likely it is that people will die (the death rate) and how likely it is that people will move into or out of each area. These are the principal components of population change and are used to construct population projections. The figure below shows the key stages of the projection analysis through to the assessment of housing requirements.



- 3.5 For the projection linked to housing targets, the methodology essentially works in reverse; with a housing figure inserted at the bottom and the modelling working back to the size of population expected for this level of housing to be occupied.
- 3.6 The series of analyses below describe some of the key inputs to the modelling, before continuing to show key outputs from the three scenarios developed.

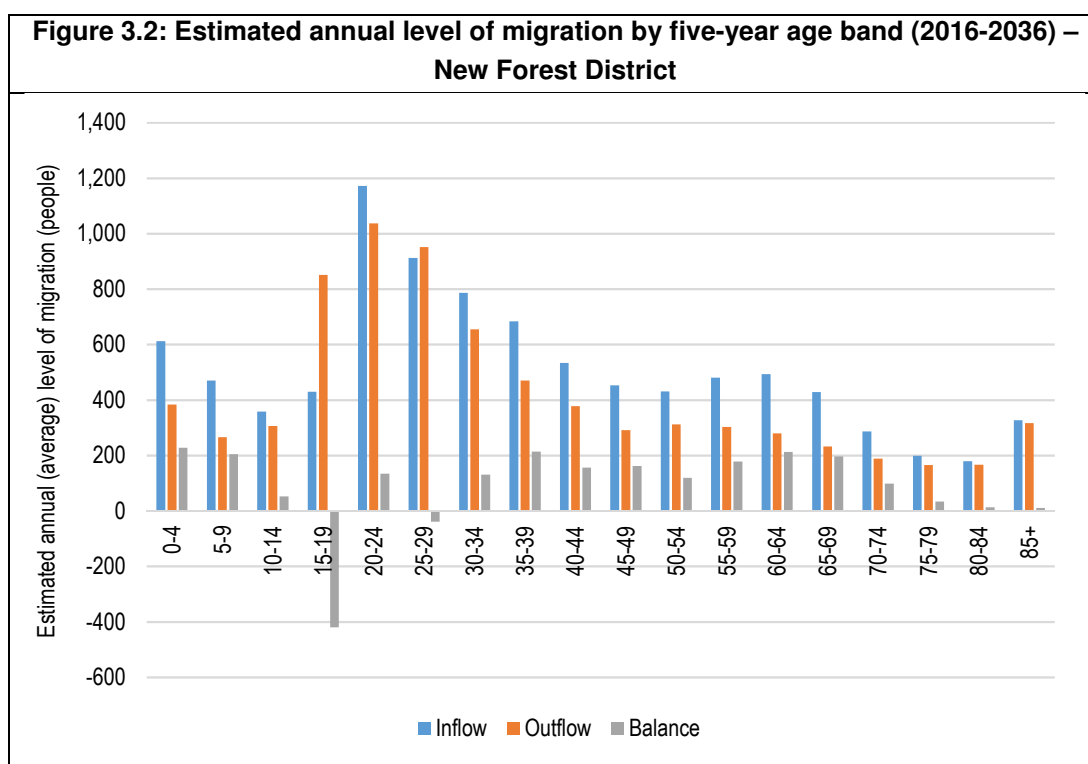
Fertility and Mortality Rate Assumptions

- 3.7 For modelling of fertility and mortality the rates contained within the ONS 2014-based subnational population projections (SNPP) for New Forest District have been used. Given that the planning authority area of the District contains about 82% of the total population, it seems reasonable to assume that the District-wide assumptions will also broadly apply to this area.
- 3.8 Adjustments for smaller areas were also considered (based on looking at ONS Output Area birth and death statistics), however there was no strong evidence that either fertility or mortality could be expected to vary substantially from the District-wide position in terms of the rates for any given age group; this is particularly the case for the forward projections where there is clearly some uncertainty. That said, it is not considered that birth or death rates will be the main driver of population change moving forward.

- 3.9 For information, the analysis of births and deaths suggested a small level of negative natural change (i.e. more deaths than births) in Avon Valley & Downlands, a much larger negative figure in South Coastal Towns, and a small positive figure for Totton & the Waterside. These past trends (which are based on data for the 2001-14 period) should be borne in mind when considering the detailed outputs from the modelling to follow.

Migration Assumptions

- 3.10 For the purposes of understanding the profile of migrants, data has again been drawn from the ONS 2014-based sub-national population projections. The figure below shows the profile of in- and out-migrants by age linked to the 2014-based SNPP. This projection sees an average level of net in-migration of 1,683 people per annum (made up of 9,235 in-migrants and 7,552 people moving out).
- 3.11 To assign a migration profile to the different sub-areas, account has been taken of the age structure in each location. District-wide estimates of both in- and out-migration (and by age/sex) have been separately developed; where an area has a greater proportion of a particular age group, it is assumed that a greater proportion of the district migration (for that age group) will be assigned to that area. In doing this it is considered that a reasonable view about migration profiles can be developed (and this is used in PROJECTION 1A). Such an approach does not however directly link to actual past levels of migration as small-area migration is not measured by ONS; however, by using information about past population growth a trend-based projection can be developed which will have higher or lower estimates of migration than in the initial modelling (this is PROJECTION 1B).



Source: Derived from ONS 2014-based subnational population projections

- 3.12 When projecting migration patterns for the various projection scenarios the migration profile has been used along with adjusted levels of in- and out-migration to match the requirements of each scenario (e.g. when testing what level of migration is required to support the level of housing growth suggested in the trajectory). This approach has consistently been adopted across all analysis.

Institutional Population

- 3.13 Modelling the data using assumptions about birth/death rates and migration, leads to estimates of how the population profile will change in the future; from this, estimates of likely household growth can be determined. Prior to converting population into households, an estimate of the number of people who live in institutional accommodation needs to be estimated. This approach is used to ensure consistency with the method used by CLG in developing their household projections. Consistent with the approach taken by CLG, the projections for New Forest use 2011 Census data (which in this case has been split down into the 3 sub-areas plus the National Park).
- 3.14 The table below shows the number of people living in institutional accommodation in each sub-area. This shows that relative to population, the National Park area has some of the highest numbers. In projecting the institutional population forward, it has been assumed that the number of people aged up to 74 will remain the same and that the proportions of the population aged 75 and over will be roughly constant. This approach is consistent with that used by CLG in their projections.

Figure 3.3: Institutional population by sex (2011)			
	Male	Female	Total
Avon Valley & Downlands	190	276	466
South Coastal Towns	253	641	894
Totton & the Waterside	280	317	597
New Forest (ex. NP)	724	1,234	1,957
New Forest NP	440	573	1,014
New Forest total	1,164	1,807	2,971

Source: 2011 Census

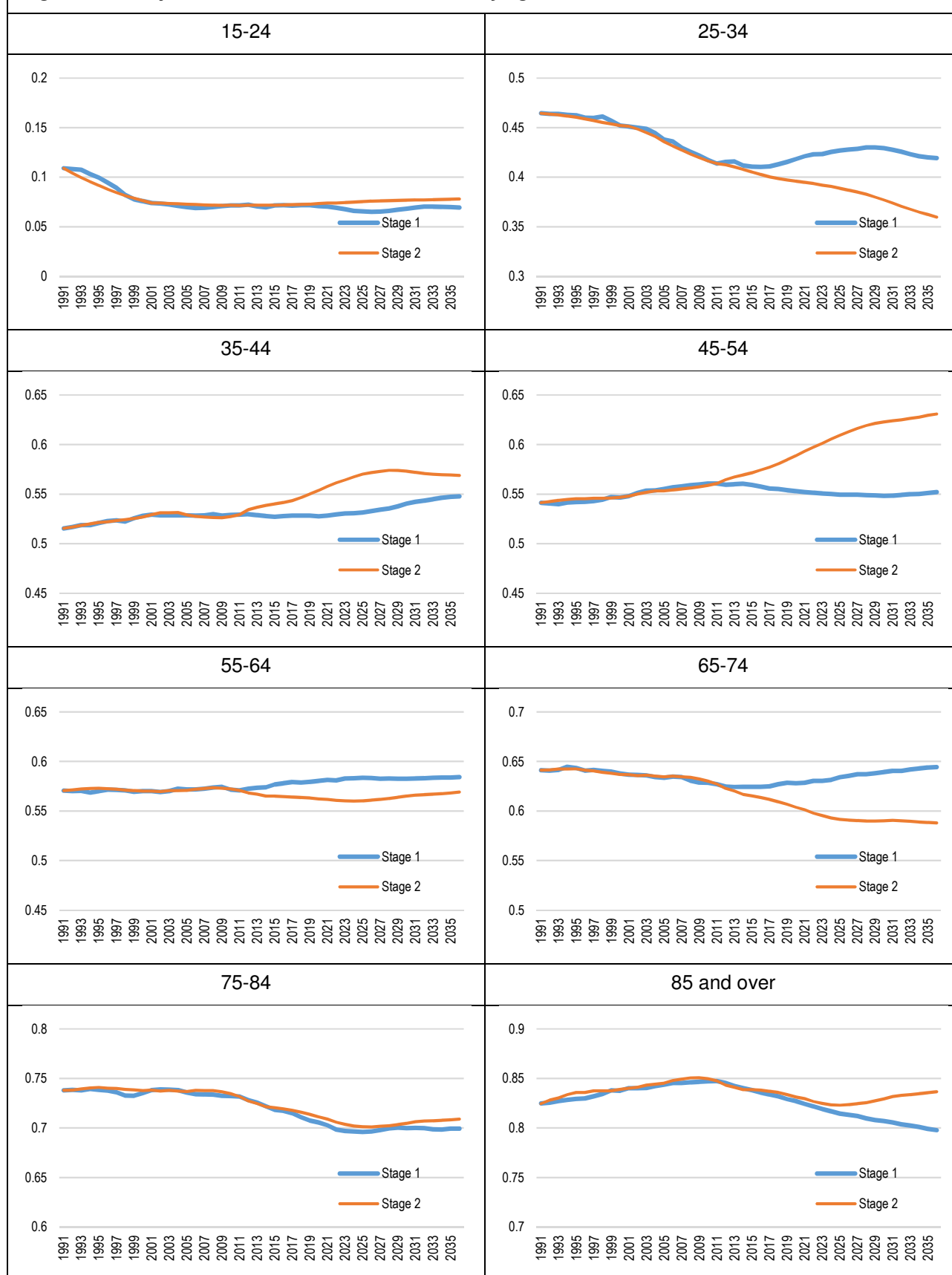
- 3.15 The estimated size of the institutional population (by age/sex) in each year of the projection is removed from the total population to give a household population; this is then taken forward into the analysis of household growth. The institutional population is however included in all population data presented in this report, unless otherwise indicated. For example, all population data presented in the tables in Appendix 2 includes both the household and institutional population.

Household Growth (Household Representative Rates (HRRs))

- 3.16 Having studied the population size and the age/sex profile of the population the next step in the process is to convert this information into estimates of the number of households in the area. To do this the concept of household representative rates (HRRs) is used. HRRs can be described in their most simple terms as the number of people who are counted as head of household (or in this case the more widely used Household Reference Person (HRP)).

- 3.17 On the 12th June 2016, CLG published a new set of (2014-based) household projections – the projections contain two core analyses. The Stage 1 household projections project household formation based on data from the 1971, 1981, 1991, 2001 and 2011 Censuses with outputs for age, sex and marital status. For younger age groups (aged under 30) greater weight was given in the CLG projections methodology to shorter-term trends, although for all age groups the methodology takes account of a combination of longer- and shorter-term trends.
- 3.18 The Stage 2 household projections consider household types and the methodology report accompanying the projections is clear that these projections are based on just two data points – from the 2001 and 2011 Census. Overall outputs on total household growth are constrained to the totals from the Stage 1 Projections. This means that both sets of projections show the same level of overall household growth (when set against the last set of SNPP) but some of the age specific assumptions differ. Differences can however occur between the Stage 1 and 2 headship rates when modelled against different population projections (due to differences in the age structure).
- 3.19 Overall, it is considered that the Stage 1 projections should be favoured over the Stage 2 figures for the purposes of considering overall household growth; this is for two key reasons: a) the Stage 1 figures are based on a long-term time series (dating back to 1971 and using 5 Census data points) whereas the Stage 2 figures only look at two data points (2001 and 2011) and b) the Stage 2 figures are constrained back to Stage 1 values, essentially meaning that it is the Stage 1 figures that drive overall estimates of household growth in the CLG household projections themselves. The analysis to follow therefore focuses on Stage 1 figures.
- 3.20 The figure below shows how the Stage 1 and Stage 2 data differs for different age groups. It is evident from the analysis that HRRs amongst households in their late 20s and early 30s fell slightly over the 2001-11 decade (albeit a continuation of the trend seen back to 1991). The (Stage 1) projections are however showing that formation will generally increase in the future. The 2014-based household projections also generally expect household formation rates amongst older age groups to fall over time. Given improving life expectancy this 'trend' looks to be reasonable (as it would be expected that more people would remain living as couples).

Figure 3.4: Projected household formation rates by age of head of household – New Forest District



Source: Derived from CLG data

- 3.21 For individual sub-areas in the New Forest, the Stage 1 figures are used as a start point, and these were then adjusted to reflect the number of households in each area. Estimates of households (in 2016) were based on a combination of 2011 Census data, combined with likely growth given population change in the 2011-15 period and a further projection of growth based on housing delivery from 2015-16. Moving forward, it is assumed that all age groups will see HRRs change in the same proportions as shown by the district-wide projections.
- 3.22 The table below shows the estimated number of households in each sub-area in 2016, along with estimated of the household population and hence average household sizes. The figures for the National Park area of the New Forest should be seen as indicative as no information about housing completions was used in the analysis, estimated figures for 2016 therefore being based on rolling forward the 2014-based SNPP (as used in PROJECTION 1A).

Figure 3.5: Estimated households, household population and average household size (2016)			
	Households	Household population	Average household size
Avon Valley & Downlands	11,656	26,702	2.29
South Coastal Towns	23,920	49,821	2.08
Totton & the Waterside	29,226	67,541	2.31
New Forest (ex. NP)	64,802	144,063	2.22
New Forest NP	13,965	31,709	2.27
New Forest total	78,767	175,772	2.23

Source: Demographic Projections

Vacant Dwellings

- 3.23 The information about household population and HRRs can be brought together to estimate how the number of households will change in the future. To convert households into dwellings the data includes an uplift to take account of vacant homes. This has been based on 2016 Council Tax Register (CTR) data with a summary of the key statistics shown below. This shows that the total number of dwellings is some 4.0% higher than the number of occupied homes (which is taken as a proxy for households) and hence household growth figures are uplifted by around 4.0% to provide an estimate of housing need. It is assumed that such a level of vacant homes will allow for movement within the housing stock and includes an allowance for second homes.

Figure 3.6: Vacant homes (Council Tax data)	
	New Forest District
Dwellings	81,094
Second Homes	1,718
Other vacant homes	1,401
Total vacant	3,119
Total occupied	77,975
Vacancy allowance	4.0%

Source: CLG

3.24 To provide vacancy rate information for each of the three sub-areas (and the National Park), data has been drawn from the 2011 Census (data about occupied household spaces). This data has then been adjusted to take account of the overall vacancy rate derived from CTR data. The estimated proportions of vacant homes (as used in analysis) are shown below:

- Avon Valley & Downlands – 3.2%
- South Coastal Towns – 5.8%
- Totton & the Waterside – 1.8%
- New Forest NP – 6.2%

Working-age population

3.25 Although not specifically required in terms of the specification for this project, it seems useful to also provide an indication of how the working-age population would be expected to change under each of the scenarios developed. The working age population is impacted not only by the age structure but also by changes to pensionable age. The box below summarises these changes.

The state pension ages (SPA) for people will change during the projection period. Between 2012 and 2018, SPA will change from 65 years for men and 61 years for women, to 65 years for both sexes. Then between December 2018 and October 2020, SPA will change from 65 years to 66 years for both men and women. Between 2026 and 2046, SPA will increase in two stages from 66 years to 68 years for both sexes. This is based on SPA under the Pensions Act 2014.

3.26 The outputs for the working-age population (and also the number of people of pensionable age) are not presented or discussed in the main body of the report; however, outputs for each of the projection scenarios can be found in Appendix 2.

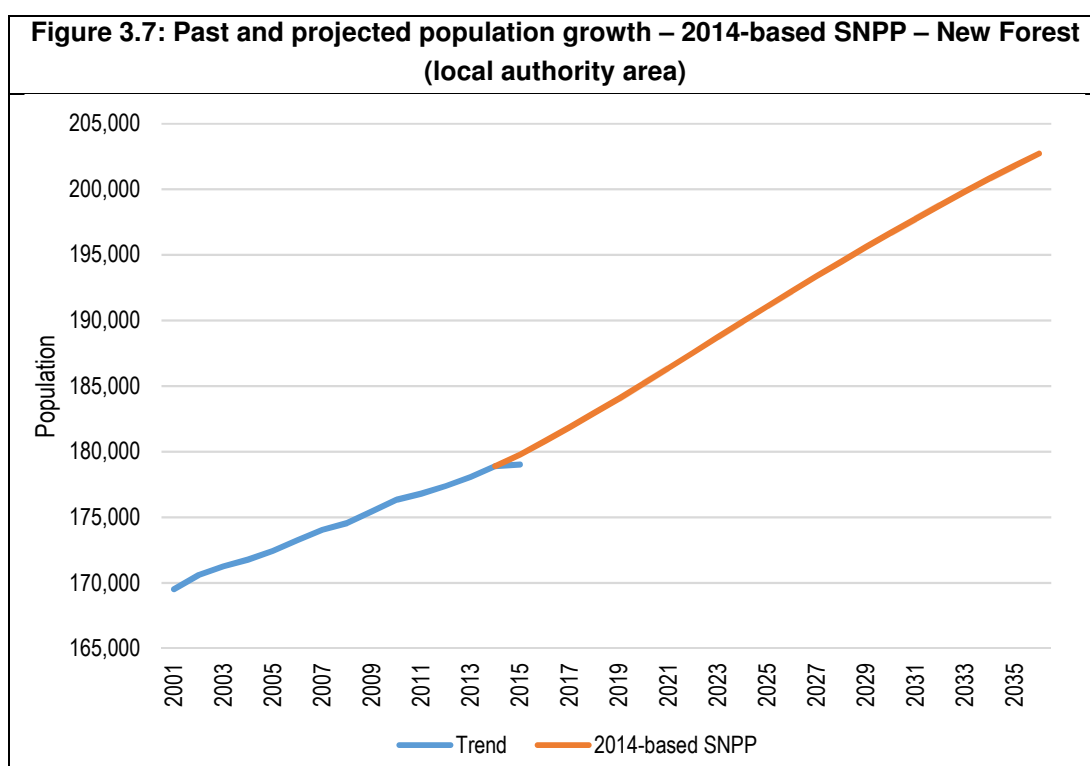
Projection Scenarios

3.27 The analysis below provides an overview of key outputs (around overall population and household growth) under each of the three scenarios developed. More detailed analysis on a year-by-year basis can be found in Appendix 2; this includes information about the projected components of population change (natural change and net migration). Additionally, more detailed outputs (by sex and single year of age) have also been provided in spreadsheet form to the Council.

PROJECTION 1A – Trend-based linked to 2014-based SNPP

3.28 The first projection developed takes the information underpinning the 2014-based subnational population projections (SNPP) and 2014-based CLG household projections, and rolls this out based on local information about the age structure, institutional population, HRRs etc. Outputs are consolidated back to those in the respective 2014-based projections, with the addition of a rebasing to 2016 (which takes account of recorded population growth in ONS MYE and also the number of completions in 2015-16).

- 3.29 Initially, it is worth briefly reflecting on the SNPP, with the figure below showing past and projected population growth up to 2036. This analysis shows that projected population growth is somewhat higher than past trends. This is driven by ONS projecting for there to be a much higher level of net migration moving forward.
- 3.30 In the 2016-36 period, ONS suggests an average net migration of 1,683 people per annum, rising from 1,500 in 2016/17 to over 1,800 by 2035/36. All of these figures are some way above past trend analysis, which shows average net migration of 1,321 over the previous 14-years (2001-15), 1,246 over the past 10-years (2005-15) and 1,060 over the past 5-years (2010-15). The period feeding into the 2014-based SNPP (2009-14 for internal migration and 2008-14 for international migration) showed an average net migration of 1,171 people per annum. It is not the purpose of this study to question the validity of official projections, but it should be noted that both projected population and migration are substantially above past trends.



Source: ONS

- 3.31 The table below shows population growth in each of the three sub-areas (plus the National Park area of the New Forest). Overall, the population is projected to increase by 13% over the 20-year period (in the planning authority area). Much of this growth is projected to be in the Totton & the Waterside area, this is due to this area having a relatively young age structure and therefore a higher level of natural change; the opposite can be observed in the South Coastal Towns area (which has a much older age profile).

Figure 3.8: Population change 2016-36 – PROJECTION 1A				
	Population 2016	Population 2036	Change in population	% change
Avon Valley & Downlands	27,199	30,961	3,762	13.8%
South Coastal Towns	50,744	52,464	1,720	3.4%
Totton & the Waterside	68,232	81,607	13,375	19.6%
New Forest (ex. NP)	146,175	165,032	18,857	12.9%
New Forest NP	32,675	35,295	2,620	8.0%
New Forest total	178,850	200,327	21,476	12.0%

Source: Demographic projections

- 3.32 A similar analysis has been provided below for the projected change in the number of households; this largely follows the patterns of population change with a higher projected level of household growth in Totton & the Waterside and much lower growth in South Coastal Towns. The final column of the table shows the estimated dwellings per annum that this level of population growth would imply.

Figure 3.9: Household change 2016-36 – PROJECTION 1A					
	Households 2016	Households 2036	Change in households	% change	Dwellings per annum
Avon Valley & Downlands	11,656	14,207	2,551	21.9%	132
South Coastal Towns	23,920	25,008	1,088	4.5%	58
Totton & the Waterside	29,226	37,310	8,084	27.7%	411
New Forest (ex. NP)	64,802	76,525	11,724	18.1%	601
New Forest NP	13,965	15,805	1,840	13.2%	98
New Forest total	78,767	92,330	13,564	17.2%	698

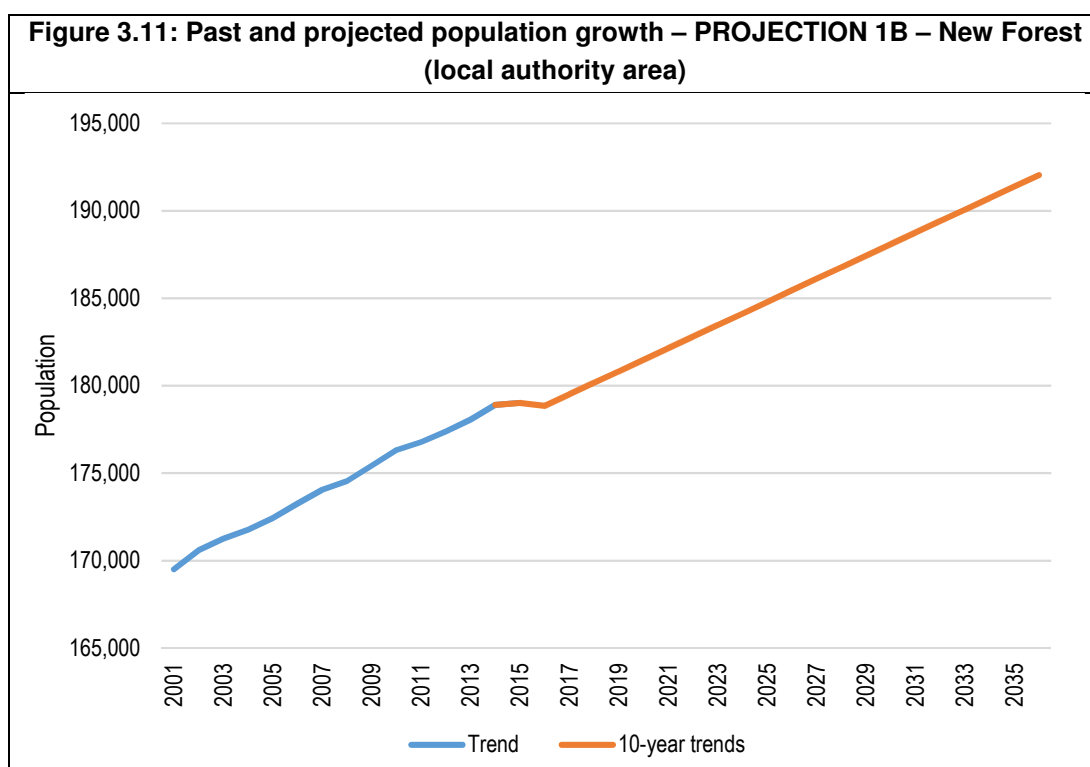
Source: Demographic projections

PROJECTION 1B – Trend-based linked to population growth in the 2005-15 period

- 3.33 The second projection uses the same underlying data as in PROJECTION 1A but with a different approach to migration and population growth. Essentially, this projection looks at the overall and average population growth in the 2005-15 period (i.e. a 10-year period) and models what level of migration would be needed if this level of growth continued into the future. Modelling the relevant population change also allows for an estimate of the likely household growth and hence housing need.
- 3.34 The table below shows estimated population growth over the 2005-15 period – this data is repeated from earlier in the report. In terms of the modelling the following levels of population growth have been used over the 2016-36 period (a 20-year period and therefore essentially double the change observed in the 2005-15 period):
- Avon Valley & Downlands – 1,510 additional people
 - South Coastal Towns – 6,952 additional people
 - Totton & the Waterside – 3,848 additional people
 - New Forest NP – 890 additional people

Figure 3.10: Population growth (2005-15)				
	2005	2015	Change	% change
Avon Valley & Downlands	26,406	27,161	755	2.9%
South Coastal Towns	47,213	50,689	3,476	7.4%
Totton & the Waterside	66,663	68,588	1,924	2.9%
New Forest (ex. NP)	140,282	146,438	6,155	4.4%
New Forest NP	32,141	32,586	445	1.4%

- 3.35 The figure below shows the population growth associated with this scenario, along with past trend data back to 2001. This shows a projected level of growth that is more in-line with past trends when compared with the 2014-based SNPP. The slight 'blip' shown for 2014-16 is due to a low level of population growth in the 2015 ONS MYE and the relatively low level of housing delivery in the 2015-16 period (which also has the impact of showing lower population growth).



Source: ONS and demographic projections

- 3.36 The table below shows population growth in each of the three sub-areas (plus the National Park area of the New Forest). Overall, the population is projected to increase by 8% over the 20-year period (in the planning authority area). Much of this growth is projected to be in the South Coastal Towns area, this is due to this area having seen the strongest growth in the past. The opposite can mainly be seen in the National Park area of the district.

Figure 3.12: Population change 2016-36 – PROJECTION 1B				
	Population 2016	Population 2036	Change in population	% change
Avon Valley & Downlands	27,199	28,709	1,510	5.6%
South Coastal Towns	50,744	57,695	6,952	13.7%
Totton & the Waterside	68,232	72,081	3,848	5.6%
New Forest (ex. NP)	146,175	158,485	12,310	8.4%
New Forest NP	32,675	33,566	890	2.7%
New Forest total	178,850	192,050	13,200	7.4%

Source: Demographic projections

- 3.37 A similar analysis has been provided below for the projected change in the number of households; this shows that despite the differing levels of population growth, the proportionate growth in households is actually projected to be broadly similar across areas. This will be due to how the age structure is projected to change, in the South Coastal Towns for example, the higher level of projected population growth sees greater increases in the population of working-age (and their associated children); this has less of an impact on household growth than additional growth in the older person population (which is seen more strongly in areas with lower projected population growth). The final column of the table again shows the estimated dwellings per annum that this level of population growth would imply.

Figure 3.13: Household change 2016-36 – PROJECTION 1B					
	Households 2016	Households 2036	Change in households	% change	Dwellings per annum
Avon Valley & Downlands	11,656	13,341	1,686	14.5%	87
South Coastal Towns	23,920	27,118	3,198	13.4%	169
Totton & the Waterside	29,226	33,686	4,460	15.3%	227
New Forest (ex. NP)	64,802	74,146	9,344	14.4%	483
New Forest NP	13,965	15,143	1,178	8.4%	63
New Forest total	78,767	89,289	10,522	13.4%	546

Source: Demographic projections

PROJECTION 2 – Housing Trajectory

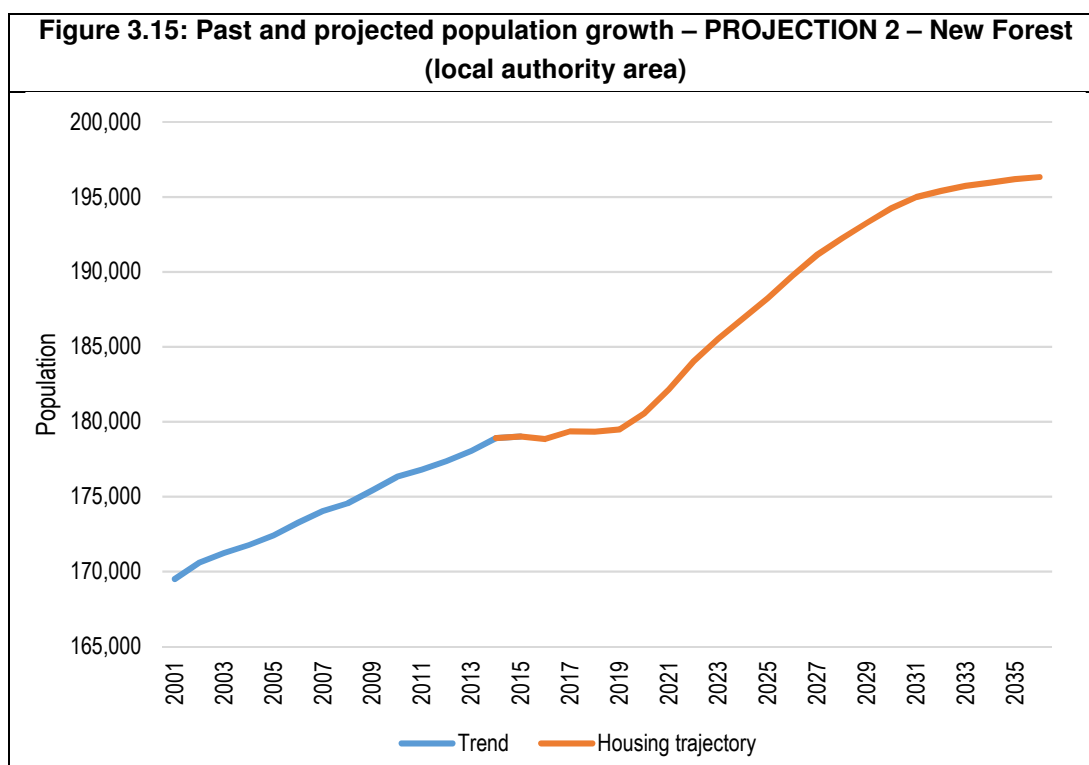
- 3.38 The third and final projection again uses the same underlying data as in PROJECTION 1A but with a different approach to migration and population growth. This projection looks at the Council's housing trajectory for 2016-36 and models what level of population growth might be expected if homes are delivered as is currently expected. The modelling takes account of the phasing of delivery as well as the overall numbers. Again, modelling the relevant population change also allows for an estimate of the likely household growth and hence housing need.

- 3.39 The table below shows the housing trajectory used in the analysis. This shows a total delivery of 10,602 dwellings over the 2016-36 period, with around half of this expected to be in the Totton & the Waterside sub-area. The figures are only for the three sub-areas of the planning authority area and do not include any equivalent data for the National Park area. To allow for district totals to be obtained, population/household figures from PROJECTION 1A have been used in the case of the National Park – this is just for the purposes of completeness and it would be equally relevant to use figures from PROJECTION 1B (or from a housing trajectory, were this to be available). In any case, given that this projection is largely looking at the planning authority area, it is not considered that this is a significant point for the analysis.

Figure 3.14: Housing Trajectory (2016-36)				
	Avon Valley & Downlands	South Coastal Towns	Totton & the Waterside	Total (ex. NP)
2016/17	80	211	90	381
2017/18	55	111	25	191
2018/19	47	57	128	232
2019/20	130	259	192	581
2020/21	259	366	170	795
2021/22	340	347	195	882
2022/23	345	216	195	756
2023/24	225	178	303	706
2024/25	229	70	402	701
2025/26	235	104	455	794
2026/27	215	95	422	732
2027/28	207	55	370	632
2028/29	190	55	365	610
2029/30	140	55	390	585
2030/31	92	55	374	521
2031/32	15	55	290	360
2032/33	15	56	270	341
2033/34	15	15	240	270
2034/35	15	15	240	270
2035/36	15	15	232	262
Total (2016-36)	2,864	2,390	5,348	10,602

Source: New Forest District Council

- 3.40 The figure below shows the population growth associated with this scenario, along with past trend data back to 2001. This shows a projected level of growth that is quite variable over time, this is due to the variable nature in when the housing delivery is expected to occur. Overall, the trajectory scenario does again look to be more in-line with past trends than the 2014-based SNPP.



Source: ONS and demographic projections

- 3.41 The table below shows population growth in each of the three sub-areas (plus the National Park area of the New Forest). Overall, the population is projected to increase by 10% over the 20-year period (in the planning authority area) – this is below the projected growth with the SNPP but above the modelling linked to 10-year migration trends. In proportionate terms, the strongest growth is projected in Avon Valley & Downlands, this is linked to a relatively high level of delivery in the trajectory (relative to the current number of dwellings/households in the area).

Figure 3.16: Population change 2016-36 – PROJECTION 2

	Population 2016	Population 2036	Change in population	% change
Avon Valley & Downlands	27,199	31,492	4,293	15.8%
South Coastal Towns	50,744	55,442	4,698	9.3%
Totton & the Waterside	68,232	74,097	5,865	8.6%
New Forest (ex. NP)	146,175	161,031	14,856	10.2%
New Forest NP	32,675	35,295	2,620	8.0%
New Forest total	178,850	196,326	17,476	9.8%

Source: Demographic projections

- 3.42 A similar analysis has been provided below for the projected change in the number of households; this is largely a direct link to the housing trajectory, with the number of households being slightly lower than delivery depending on the assumptions made about vacant homes in each area.

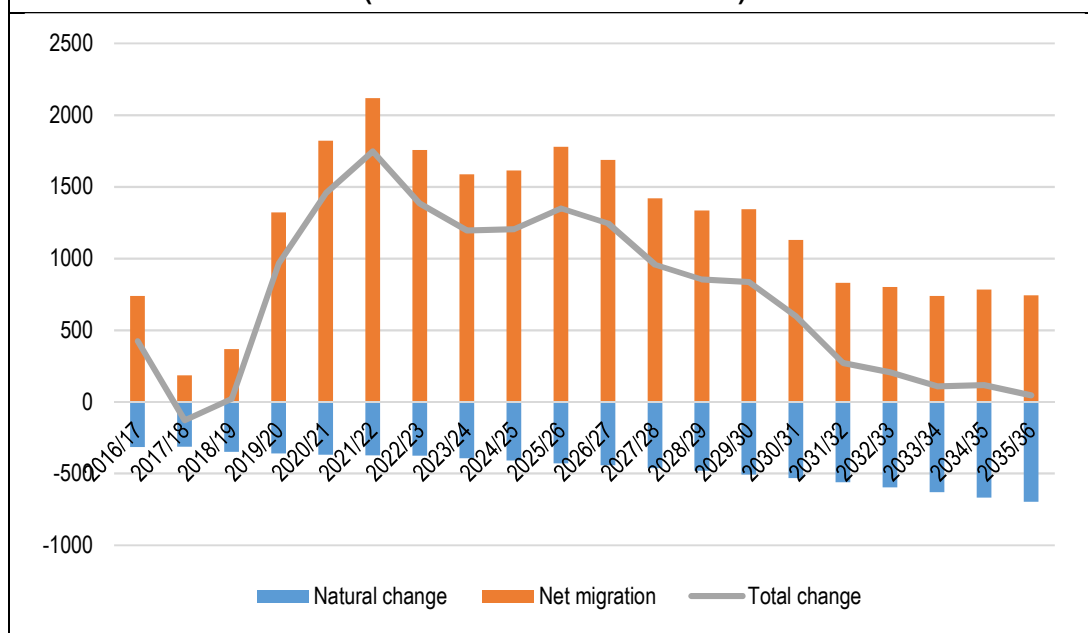
Figure 3.17: Household change 2016-36 – PROJECTION 2

	Households 2016	Households 2036	Change in households	% change	Dwellings per annum
Avon Valley & Downlands	11,656	14,430	2,774	23.8%	143
South Coastal Towns	23,920	26,178	2,258	9.4%	119
Totton & the Waterside	29,226	34,481	5,255	18.0%	267
New Forest (ex. NP)	64,802	75,089	10,287	15.9%	530
New Forest NP	13,965	15,805	1,840	13.2%	98
New Forest total	78,767	90,894	12,127	15.4%	628

Source: Demographic projections

Components of Population Change

- 3.43 Appendix 2 provides more detail sitting behind each of the projections (including estimates of births, deaths and migration). This section briefly picks up on some of this information to look at what is projected to be the main driver of population growth in the future. The data presented below is from PROJECTION 2 (Housing Trajectory) and clearly shows that natural change is projected to be negative throughout the projection period, and at an increasing level over time. Net migration is consistently positive, and is projected to be variable, depending on the dates when homes are expected to be completed. Overall, for the 20-year projection period, natural change is projected to average -464 per annum (i.e. identifying more deaths than births) with net migration averaging 1,204 people per annum.

Figure 3.18: Projected Components of Population Change 2016-36 – PROJECTION 2 (New Forest ex. National Park)

Source: Demographic projections

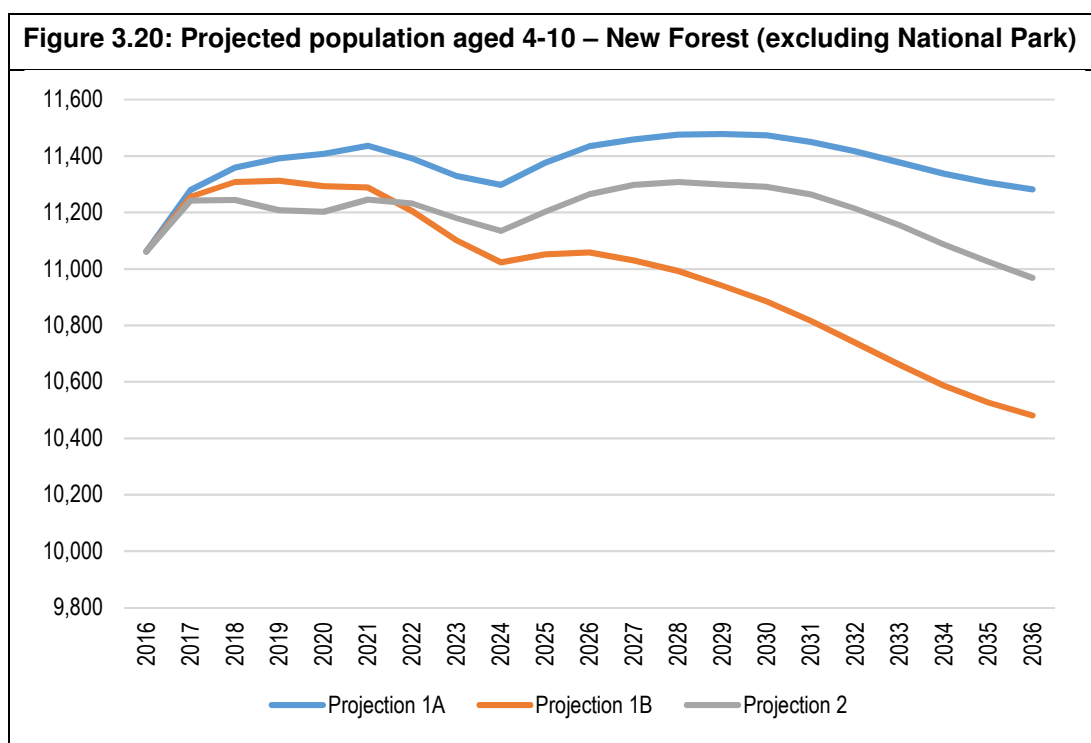
Changes to the School-Age Population

- 3.44 The series of data below looks at projected changes to the school-age population within the Plan area (i.e. excluding the National Park). The data is split into two groups; ages 4-10 (broadly aligning with primary school) and 11-16 (secondary school).
- 3.45 The table and figure below show projected population change for the population aged 4-10 between 2016 and 2036. Focussing on the Housing Trajectory projection (Projection 2), it can be seen that the number of people aged 4-10 is projected to increase slightly over the first year of the projection and then level off until about 2024; following that, there is projected to be a period of increase to about 2028, before the population aged 4-10 begins to decline. By 2036, it is projected that the population aged 4-10 will be very slightly lower than in 2016. There are some differences by sub-area, with the South Coastal Towns projected to see an increase in the population aged 4-10, and Totton & the Waterside a decrease.

Figure 3.19: Projected population aged 4-10 – New Forest (excluding National Park) – sub-areas							
		2016	2021	2026	2031	2036	Change 2016-36
Projection 1A	Avon Valley & Downlands	2,157	2,018	1,929	2,016	2,146	-11
	South Coastal Towns	3,142	3,302	3,381	3,442	3,384	242
	Totton & the Waterside	5,762	6,116	6,124	5,991	5,751	-11
	New Forest (ex. NP)	11,061	11,437	11,435	11,450	11,282	220
Projection 1B	Avon Valley & Downlands	2,157	1,980	1,838	1,855	1,921	-236
	South Coastal Towns	3,142	3,398	3,605	3,830	3,906	764
	Totton & the Waterside	5,762	5,911	5,616	5,131	4,655	-1,108
	New Forest (ex. NP)	11,061	11,289	11,059	10,815	10,481	-580
Projection 2	Avon Valley & Downlands	2,157	2,014	2,060	2,213	2,285	128
	South Coastal Towns	3,142	3,423	3,652	3,825	3,769	627
	Totton & the Waterside	5,762	5,809	5,553	5,226	4,915	-847
	New Forest (ex. NP)	11,061	11,245	11,265	11,264	10,969	-93

Source: Demographic projections

- 3.46 The 'dip' in the number of people aged 4-10 in 2024, is likely to be due to cohort effects rather than any projected change in relation to this particular year (e.g. a smaller cohort of people aged 3 in 2023, as well as being influenced by the population of females of child-bearing age). That said, whilst the graph seems to show a notable 'dip', this needs to be understood in the context of the axis scale being used. Taking the example of PROJECTION 2 (Housing Trajectory) it is the case that the number of people aged 4-10 only falls by 111 from 2021 to 2024 – less than a 1% change.
- 3.47 More detailed charts showing the same information for each of the three planning authority sub-areas can be found in Appendix 1.



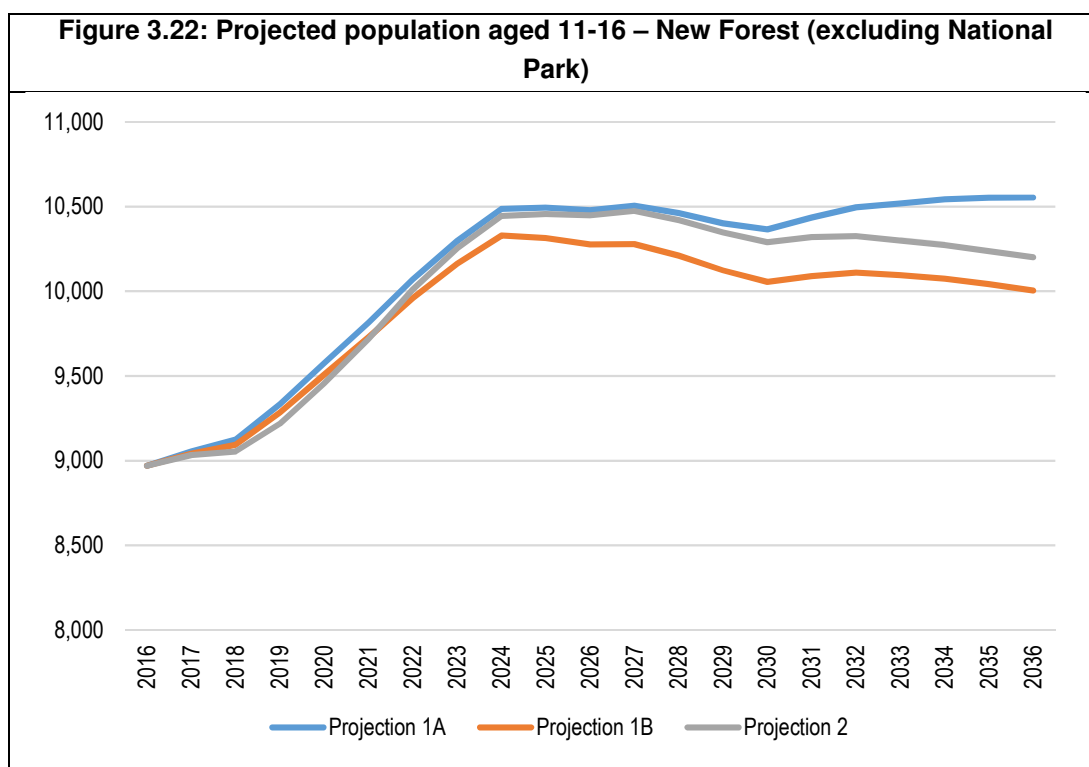
Source: Demographic projections

- 3.48 The table and figure below show the same information for the population aged 11-16. In this case the three projections show a similar pattern, with an increase in numbers to about 2024, and then a levelling off (or slight decline). Focussing on the Housing Trajectory projection (Projection 2), it can be seen by 2036, that the population aged 11-16 is projected to be around 14% higher than it was in 2016. For sub-areas, the analysis suggests increases in the population aged 11-16 in South Coastal Towns and Totton & the Waterside, with a modest decline in Avon Valley & Downlands.

Figure 3.21: Projected population aged 11-16 – New Forest (excluding National Park) – sub-areas

		2016	2021	2026	2031	2036	Change 2016-36
Projection 1A	Avon Valley & Downlands	1,995	2,002	1,935	1,792	1,848	-146
	South Coastal Towns	2,622	2,779	2,975	3,046	3,150	529
	Totton & the Waterside	4,354	5,035	5,569	5,597	5,555	1,201
	New Forest (ex. NP)	8,970	9,816	10,479	10,435	10,553	1,583
Projection 1B	Avon Valley & Downlands	1,995	1,974	1,875	1,692	1,692	-303
	South Coastal Towns	2,622	2,839	3,095	3,255	3,502	880
	Totton & the Waterside	4,354	4,915	5,307	5,142	4,811	457
	New Forest (ex. NP)	8,970	9,728	10,277	10,089	10,004	1,034
Projection 2	Avon Valley & Downlands	1,995	2,002	2,033	1,902	1,910	-84
	South Coastal Towns	2,622	2,859	3,117	3,238	3,441	819
	Totton & the Waterside	4,354	4,859	5,298	5,180	4,850	496
	New Forest (ex. NP)	8,970	9,719	10,448	10,321	10,201	1,230

Source: Demographic projections



3.49 As with the 4-10 age group, more detailed charts showing the same information for each of the three planning authority sub-areas can be found in Appendix 1.

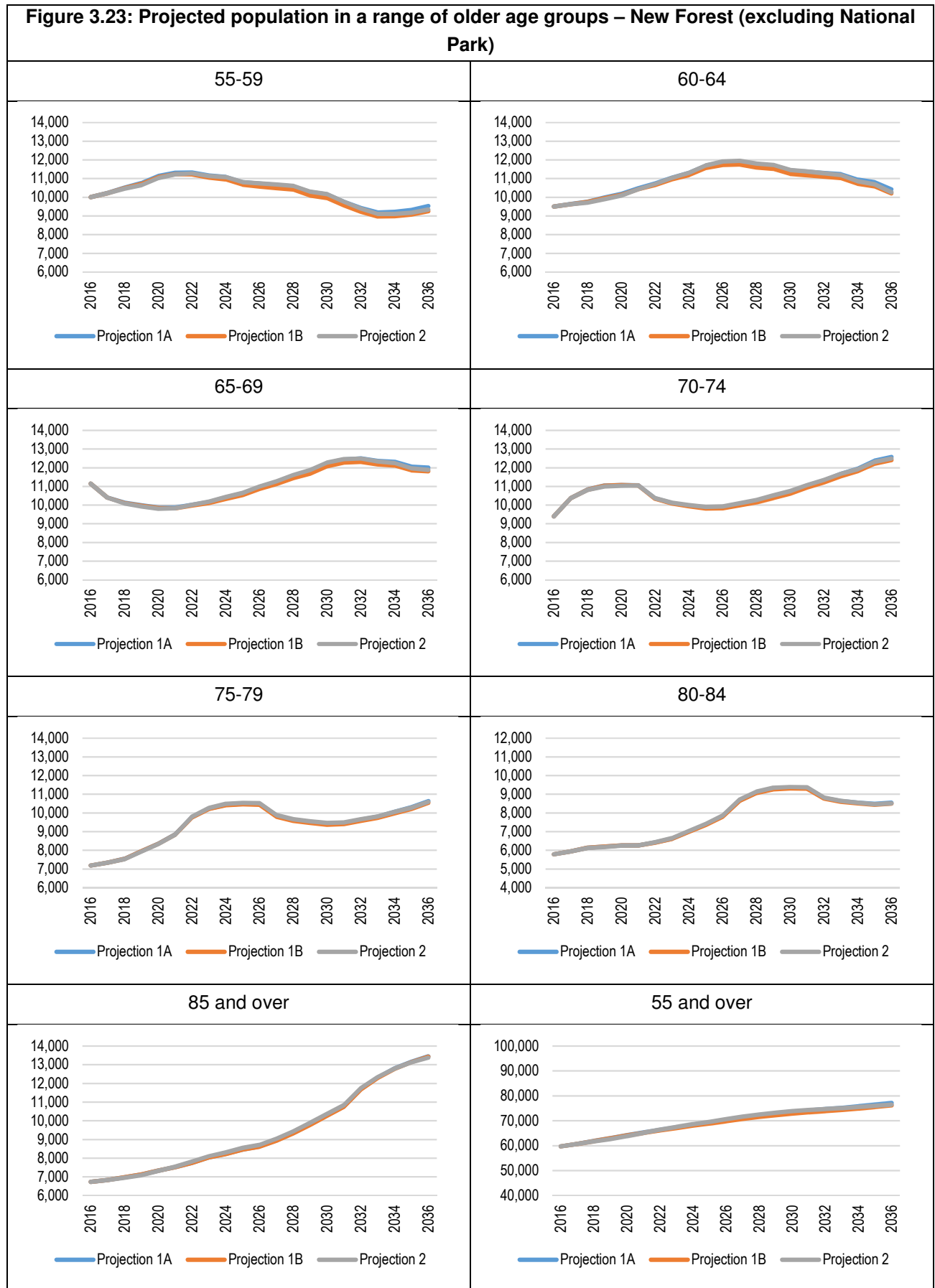
Changes to Older Person Population

3.50 A similar analysis is provided below to look at changes to the older person population. In this case data is provided for seven age groups. These are:

- 55-59
- 60-64
- 65-69
- 70-74
- 75-79
- 80-84
- 85 and over

3.51 Rather than provide a full series of tables (as with the school age population), the information from these groups is initially summarised in the figure below. This shows a steady increase in the population aged 55 and over from 2016 to 2036; rising from around 60,000 people to 76-77,000 (depending on the scenario). Within the over 55 age group, the data projects for there to be notable increases in all age groups from 70 onwards, smaller increases in the 60-64 and 65-69 age groups and a slight decline for the population aged 55-59.

3.52 More detailed charts showing the same information for each of the three planning authority sub-areas can be found in Appendix 1.



Source: Demographic projections

- 3.53 As can be seen from the analysis above, there is little difference between the different projection scenarios in terms of older person population growth; this is because older age groups tend to have lower levels of migration, and migration is the key driver of population change in the District. This means that any adjustments to migration in the different scenarios tend to impact to a greater extent on younger age groups (typically people of working age and their associated children).
- 3.54 The table below provides some more detailed outputs from the projections in terms of older people. Given the comment above about the different projections being broadly similar, data has only been provided from PROJECTION 2 (Housing Trajectory). Additional information about age structure changes for other scenarios can be found in Appendix 2 (and within a series of spreadsheets sent separately to the local authority). The analysis shows that all areas are projected to see some ageing of the population and that this looks to be particularly notable in Totton & the Waterside. Increases in the older person population of the South Coastal Towns looks to be fairly modest, however, this does need to be understood against a background where this area already has a substantially older population structure than other parts of the District.

Figure 3.24: Projected population in a range of older age groups – New Forest (excluding National Park) – PROJECTION 2 (Housing Trajectory) – sub-areas

		2016	2021	2026	2031	2036	Change 2016-36
55-59	Avon Valley & Downlands	1,999	2,208	2,237	2,022	1,808	-191
	South Coastal Towns	3,262	3,676	3,462	3,085	2,896	-366
	Totton & the Waterside	4,748	5,343	5,051	4,652	4,639	-109
	New Forest (ex. NP)	10,010	11,227	10,750	9,758	9,344	-666
60-64	Avon Valley & Downlands	1,841	2,090	2,407	2,365	2,077	236
	South Coastal Towns	3,412	3,525	3,940	3,678	3,310	-102
	Totton & the Waterside	4,248	4,810	5,561	5,344	4,884	636
	New Forest (ex. NP)	9,501	10,424	11,908	11,388	10,272	771
65-69	Avon Valley & Downlands	2,028	1,904	2,246	2,511	2,412	383
	South Coastal Towns	4,676	3,652	3,785	4,172	3,938	-738
	Totton & the Waterside	4,440	4,276	4,966	5,783	5,539	1,099
	New Forest (ex. NP)	11,145	9,833	10,997	12,466	11,889	744
70-74	Avon Valley & Downlands	1,616	2,008	1,949	2,253	2,470	854
	South Coastal Towns	4,230	4,723	3,734	3,850	4,266	36
	Totton & the Waterside	3,549	4,312	4,248	4,974	5,758	2,208
	New Forest (ex. NP)	9,395	11,043	9,931	11,076	12,494	3,099
75-79	Avon Valley & Downlands	1,256	1,521	1,941	1,860	2,125	870
	South Coastal Towns	3,234	4,036	4,512	3,579	3,725	491
	Totton & the Waterside	2,700	3,285	4,071	4,059	4,742	2,043
	New Forest (ex. NP)	7,190	8,843	10,524	9,499	10,593	3,403
80-84	Avon Valley & Downlands	1,019	1,097	1,378	1,731	1,646	627
	South Coastal Towns	2,662	2,859	3,591	4,002	3,228	566
	Totton & the Waterside	2,106	2,310	2,897	3,637	3,643	1,537
	New Forest (ex. NP)	5,787	6,267	7,866	9,370	8,518	2,731
85 and over	Avon Valley & Downlands	1,111	1,295	1,546	1,912	2,385	1,274
	South Coastal Towns	3,400	3,666	4,092	4,986	5,927	2,527
	Totton & the Waterside	2,221	2,579	3,081	3,939	5,064	2,843
	New Forest (ex. NP)	6,732	7,540	8,718	10,837	13,376	6,644
55 and over	Avon Valley & Downlands	10,870	12,124	13,704	14,654	14,924	4,054
	South Coastal Towns	24,877	26,137	27,116	27,352	27,292	2,415
	Totton & the Waterside	24,014	26,915	29,874	32,389	34,270	10,256
	New Forest (ex. NP)	59,760	65,177	70,694	74,395	76,486	16,725

Source: Demographic projections

Comparison with data from Hampshire County Council

- 3.55 The projections in this report have been developed independently, drawing on a range of data published by ONS. Separately, Hampshire County Council (HCC) regularly publish their own projections and population estimates; the latest data take a 2016 base. The HCC figures do not typically draw on ONS MYE data and instead takes the 2011 Census population as a start point, and rolls data forward on the basis of dwelling completions (combined with data about the number of births and deaths).

- 3.56 Given that these alternative figures exist, it is worthwhile providing a brief comparison of the key outputs and below a comparison of the base position in 2016 is shown. The only comparison made in this report is for the base period, as moving forward from 2016, the HCC forecasts and the projections in this report use very different assumptions. It should also be noted that one of the main purposes of the HCC figures is to consider potential demand for school places, there is therefore a particular focus on younger age groups. The comparison provided is for the New Forest excluding National Park areas.
- 3.57 The analysis below shows, despite the two projections/forecasts using slightly different data sources and methodologies that the base estimates for 2016 are fairly similar. The overall estimates of the total population are only 500 different (0.4%) whilst the difference in age groups under 20 are also pretty modest. Hence it is suggested that there is a reasonable degree of agreement between analysis and the using the HCC data for the purposes of school place planning remains sound.

Figure 3.25: Comparison of estimated population by age in 2016 (New Forest (ex. NP))				
	HCC estimate	JGC study	Difference	% difference from HCC
Age 0-4	7,080	7,240	160	2.3%
Aged 5-9	7,940	7,943	3	0.0%
Aged 10-14	7,338	7,486	147	2.0%
Aged 15-19	7,382	7,298	-84	-1.1%
Aged 20-24	6,556	6,513	-43	-0.7%
Aged 25-29	6,624	7,073	449	6.8%
Aged 30-34	6,795	6,712	-83	-1.2%
Aged 35-39	7,257	7,156	-101	-1.4%
Aged 40-44	8,578	8,327	-251	-2.9%
Aged 45-49	9,864	9,795	-69	-0.7%
Aged 50-54	10,793	10,871	78	0.7%
Aged 55-59	10,042	10,010	-32	-0.3%
Aged 60-64	9,453	9,501	48	0.5%
Aged 65-69	11,066	11,145	79	0.7%
Aged 70-74	8,985	9,395	410	4.6%
Aged 75-79	7,194	7,190	-4	-0.1%
Aged 80-84	5,730	5,787	57	1.0%
Aged 85+	6,975	6,732	-243	-3.5%
All Ages	145,654	146,175	522	0.4%

Source: Hampshire County Council and demographic projections

Summary

- 3.58 The main analysis in this report was to develop a series of projections linked to different assumptions. Three projections were developed, two based on demographic-trends and one linking to the Council's housing trajectory. For all of these projections a full set out outputs around population growth, age structure, the components of population change, household growth and housing need has been provided. The projections covered the period from 2016 to 2036.

- 3.59 The first projection linked to the assumptions in the 2014-based subnational population projections (SNPP). It was observed that ONS are projecting for population growth to be somewhat above past trends, with assumptions about future migration also being higher than has typically been observed in the past. Overall, this scenario (PROJECTION 1A) showed population growth of 18,900 people across the district (excluding the National Park) and 11,700 additional households (which would translate into a need for 601 additional dwellings each year). Population and household growth was projected to be particularly strong in the Totton & the Waterside area.
- 3.60 The second projection (PROJECTION 1B), looked at past trends in population growth (2005-15) and modelled data on the assumption that these average trends would be repeated in the future. This projection shows a more modest increase in the population and a greater focus on population growth in the South Coastal Towns sub-area. In terms households, this projection suggested a more even split of growth and housing need (relative to the current number of households in each area). Overall, this scenario suggested a need for around 483 dwellings per annum.
- 3.61 The final projection (PROJECTION 2) used information from the Council's housing trajectory to model what level of population growth might occur if housing delivery comes forward as expected. Across the planning authority area, this projection sees population growth somewhere in-between that shown by the two trend-based projections, but with some notable year-on-year variations. Overall, this scenario projects a population growth of around 14,900 people, with housing delivery of around 10,600 dwellings.

4. Older Persons Housing Needs

Introduction

- 4.1 The second main analysis of the study is to provide and update to the analysis and recommendations in the 2014 Strategic Housing Market Assessment (SHMA) on the characteristics of the older population and the likely future need for housing and other forms of sheltered or care accommodation for older people. The analysis in this section has focussed on PROJECTION 2 (linked to the housing trajectory) and largely focusses on the projections developed for the planning authority area of the District.

The 2014 SHMA

- 4.2 The analysis in the SHMA initially considered the current population of older persons and contrast this with a range of other areas, before moving on to look at projected changes moving forward. Analysis of 2011 Census data was provided to look at the household composition of older persons, their current tenure and occupancy ratings (the Census data has not changed since the SHMA and so no update is provided). The analysis moved on to look at projected changes to the number of people with a range of health issues, with the final analysis looking at the need for specialist housing.
- 4.3 This latter analysis drew on information from the Housing Learning and Information Network (Housing LIN) and concluded that there was a need for around 5,000 additional sheltered and extra-care units, plus around 2,000 registered care bedspaces (within a C2 use class). Further sub-area analysis identified that much of the need was likely to arise in the South Coastal Towns sub-area.

Current Population of Older Persons

- 4.4 Some analysis of the population age structure has been undertaken earlier in this report. In this section, a greater focus is given to age bands within the older age groups (for consistency with the 2014 SHMA, this is taken to be age groups 55 and over). The base data for the current population is taken to be mid-2015, this being the latest date for which information was available at the time of writing.
- 4.5 The first table below compares the population profile in the New Forest (district) with a range of comparator areas. From this it is clear that New Forest has an old age structure, with 41% of the population being aged 55 and over, the next highest comparison area is Hampshire with a figure of just 33%. When looking at individual age bands, it is also clear that the New Forest has an 'older' old population, with 9% of the population being aged 75-84 and 4.5% aged 85+. These figures are important given that projections of the need for specialist accommodation tend to focus on people aged 75 and over.

Figure 4.1: Older person population (2015)

	New Forest		Hampshire	South East	England
	Population	% of population	% of population	% of population	% of population
Under 55	105,121	58.7%	67.0%	69.7%	71.0%
55-64	24,447	13.7%	12.3%	11.5%	11.3%
65-74	25,325	14.1%	11.2%	10.1%	9.6%
75-84	16,129	9.0%	6.6%	6.0%	5.7%
85+	8,001	4.5%	2.9%	2.7%	2.4%
Total	179,023	100.0%	100.0%	100.0%	100.0%
Total 55+	73,902	41.3%	33.0%	29.0%	30.3%

Source: ONS mid-year population estimates

- 4.6 At a more localised level, the analysis confirms a particularly old population in the South Coastal Towns, notable within this area is the very high proportion of people aged 75 and over, making up over 18% of the total population in 2015.

Figure 4.2: Older person population by sub-area (2015)

	Avon Valley & Downlands	South Coastal Towns	Totton & the Waterside	New Forest (ex. NP)	New Forest NP	New Forest total
Under 55	60.7%	51.1%	65.6%	59.7%	54.3%	58.7%
55-64	13.9%	13.2%	12.9%	13.2%	15.7%	13.7%
65-74	13.0%	17.4%	11.3%	13.7%	16.0%	14.1%
75-84	8.5%	11.7%	7.0%	8.9%	9.5%	9.0%
85+	3.9%	6.6%	3.1%	4.5%	4.5%	4.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total 55+	39.3%	48.9%	34.4%	40.3%	45.7%	41.3%

Source: ONS mid-year population estimates

Projected Change in the Population of Older People

- 4.7 As well as providing a baseline position for the proportion of older persons in the District, published population projections and the alternative scenarios developed in this report can be used to provide an indication of how the numbers might change in the future compared with other areas. The initial data provided below is based on the 2014-based SNPP which is the latest source available consistently across areas.
- 4.8 The data shows that New Forest (in line with other areas) is expected to see a notable increase in the older person population with the total number of people aged 55 and over expected to increase by 28% over to 20-years to 2036. This figure is however lower than projected for other areas. The difference between New Forest and the region is mainly due to the very high proportion of older people currently in the population (which makes higher proportionate increase difficult). The data for New Forest is also notable for showing a small reduction in the population aged 55-64.

Figure 4.3: Projected Change in Population of Older Persons (2016-36)				
	New Forest	Hampshire	South East	England
Under 55	0.5%	0.2%	4.3%	4.8%
55-64	-1.3%	3.2%	13.0%	8.3%
65-74	18.8%	26.8%	31.9%	29.3%
75-84	50.2%	60.5%	59.8%	54.2%
85+	105.3%	130.7%	118.9%	113.1%
Total	12.1%	11.5%	14.6%	13.0%
Total 55+	28.5%	33.9%	37.9%	32.9%

Source: 2014-based SNPP

- 4.9 For individual sub-areas, a similar analysis has been undertaken on the basis of PROJECTION 2 (linked to the housing trajectory). All areas are projected to see an increase in the proportion of people aged 55 and over. The data for the South Coastal Towns is interesting, showing a relatively low growth in the number of older persons. This looks to partly be due to some smaller age cohorts moving through time, but also reflects the earlier finding that this area already has a substantial older person population, by 2036 it is projected that 49% of the population of the South Coastal Towns will be aged 55 or over, and 23% aged 75 and over.

Figure 4.4: Projected Change in Population of Older Persons by sub-area (2016-36)						
	Avon Valley & Downlands	South Coastal Towns	Totton & the Waterside	New Forest (ex. NP)	New Forest NP	New Forest total
Under 55	1.5%	8.8%	-9.9%	-2.2%	-5.9%	-2.8%
55-64	1.2%	-7.0%	5.9%	0.5%	-19.9%	-3.7%
65-74	34.0%	-7.9%	41.4%	18.7%	14.3%	17.8%
75-84	65.8%	17.9%	74.5%	47.3%	62.2%	50.2%
85+	114.7%	74.3%	128.0%	98.7%	129.1%	104.3%
Total	15.8%	9.3%	8.6%	10.2%	8.0%	9.8%
Total 55+	37.3%	9.7%	42.7%	28.0%	24.1%	27.2%

Source: Demographic projections

Health-related Population Projections

- 4.10 In addition to providing projections about how the number and proportion of older people is expected to change in the future, analysis can look at the likely impact on the number of people with specific illnesses or disabilities. Consistent with the 2014 SHMA, data is taken from the Projecting Older People Information System (POPPI) website which provides prevalence rates for different disabilities by age and sex. Analysis has focussed on estimates of the number of people with dementia and mobility problems. The analysis has again been based on PROJECTION 2 (housing trajectory)
- 4.11 For both of the health issues analysed the figures relate to the population aged 65 and over. The figures from POPPI are based on prevalence rates from a range of different sources and whilst these might change in the future (e.g. as general health of the older person population improves) the estimates are likely to be of the right order.

- 4.12 The table below shows that both of the illnesses/disabilities are expected to increase significantly in the future although this would be expected given the increasing population. In particular there is projected to be a large rise in the number of people with dementia (up 60%) along with a 61% increase in the number with mobility problems.

Figure 4.5: Estimated Population Change for range of Health Issues (2016 to 2036)					
	Type of illness/ disability	2016	2036	Change	% increase
Avon Valley & Downlands	Dementia	675	1,098	423	62.8%
	Mobility problems	1,341	2,315	974	72.7%
South Coastal Towns	Dementia	1,555	2,160	605	38.9%
	Mobility problems	3,668	4,904	1,236	33.7%
Totton & the Waterside	Dementia	1,192	2,146	954	80.1%
	Mobility problems	2,786	5,088	2,302	82.6%
New Forest (ex. NP)	Dementia	3,422	5,405	1,983	57.9%
	Mobility problems	7,794	12,306	4,512	57.9%
New Forest NP	Dementia	861	1,460	599	69.6%
	Mobility problems	1,867	3,202	1,335	71.5%
New Forest total	Dementia	4,283	6,865	2,582	60.3%
	Mobility problems	9,661	15,508	5,847	60.5%

Source: Data from POPPI and demographic projections

Need for Specialist Housing for Older Persons

- 4.13 The 2014 SHMA drew on data from the Housing and Learning Information Network (Housing LIN) to estimate the need for specialist housing for older persons. The latest information (which covers a period to 2035) is presented in the table below. This suggests a need for just under 8,000 units of accommodation, of which around 2,500 are Registered Care bedspaces.

Figure 4.6: Estimated need for Specialist Housing for Older People – New Forest District (Housing LIN data)			
	Current need	Additional need (to 2035)	Total need
Sheltered – affordable	878	1,007	1,885
Sheltered – market	1,081	1,589	2,670
Extra-care – affordable	306	282	588
Extra-care – market	185	170	355
Registered care	486	1,969	2,455
TOTAL	2,936	5,017	7,953

Source: Housing LIN

- 4.14 Whilst the Housing LIN data is useful, it is not entirely clear how well it reflects actual local needs; being based, as it is, on a series of national prevalence rates. The use of these rates may in part drive the high level of current need which in reality may not exist to this magnitude. In more recent studies than the 2014 SHMA, analysis has been carried out based on demographic projections (i.e. to essentially ignore if there is any current need) and to project what new need will arise in the future. This approach has been taken in this study, with outputs linked to PROJECTION 2 (housing trajectory).
- 4.15 For the purpose of analysis, the prevalence rates have been taken from Housing LIN (although, as noted above, it should be remembered that these are national rates). These rates split data between sheltered and extra-care housing and by broad tenure; in reality it may be the case that the Council would seek to provide a higher proportion of specialist housing as extra-care (this is the trend observed nationally over the past few years). The Housing LIN figures are all presented as a rate per 1,000 population aged 75 and over with the base assumptions shown below:
- Sheltered – affordable – 56 dwellings per 1,000 population (including enhanced sheltered)
 - Sheltered – market – 89 dwellings per 1,000 population
 - Extra-care – affordable – 26 dwellings per 1,000 population
 - Extra-care – market – 10 dwellings per 1,000 population
- 4.16 Additionally, estimates of the need for registered care bedspaces (in a C2 use class) are taken directly from the demographic projections. In this case it is assumed (as it is by CLG in their projections) that the proportion of people (again aged 75 and over) who are living in institutional accommodation will remain roughly the same as at the start of the projection (when data for both sexes is considered together). Hence this proportion (adjusted by area) is applied to the projected increase in the number of people aged 75 and over to give a figure for the C2 need. For information, the table below shows the estimated proportion of the population in institutional accommodation by age, sex and sub-area, as used in the modelling.

Figure 4.7: Proportion of population age 75 and over living in institutional accommodation					
Area	Age	Males		Females	
		2016	2036	2016	2036
Avon Valley & Downlands	75-79	1.8%	2.2%	1.6%	1.6%
	80-84	3.3%	3.6%	5.1%	4.9%
	85+	9.1%	8.7%	19.3%	17.8%
South Coastal Towns	75-79	1.3%	1.6%	1.8%	1.8%
	80-84	2.6%	2.8%	5.7%	5.4%
	85+	8.8%	8.5%	20.1%	18.6%
Totton & the Waterside	75-79	0.8%	1.0%	1.4%	1.4%
	80-84	2.4%	2.6%	4.5%	4.3%
	85+	9.4%	9.1%	17.7%	16.4%
New Forest NP	75-79	1.6%	1.9%	2.2%	2.2%
	80-84	4.3%	4.7%	7.6%	7.2%
	85+	12.1%	11.6%	26.9%	24.9%

Source: Derived from 2014-based CLG household projections and 2011 Census

- 4.17 The table below therefore shows the need for specialist accommodation associated with this analysis. Across the planning authority area of the New Forest, this suggests a need for 2,175 dwellings (in a C3 use class) and a further 970 bedspaces in C2 – these figures represent 109 dwellings and 49 bedspaces per annum respectively.

Figure 4.8: Projected need for specialist housing for older persons by sub-area (2016-36)

	Avon Valley & Downlands	South Coastal Towns	Totton & the Waterside	New Forest (ex. NP)	New Forest NP	New Forest total
Sheltered – affordable	156	202	361	719	220	938
Sheltered – market	246	318	570	1,134	347	1,481
Extra-care – affordable	44	56	101	201	62	263
Extra-care – market	26	34	61	121	37	158
Total (ex. Reg. care)	472	610	1,093	2,175	665	2,840
Registered care	203	342	425	970	423	1,394
TOTAL	675	952	1,519	3,146	1,088	4,234

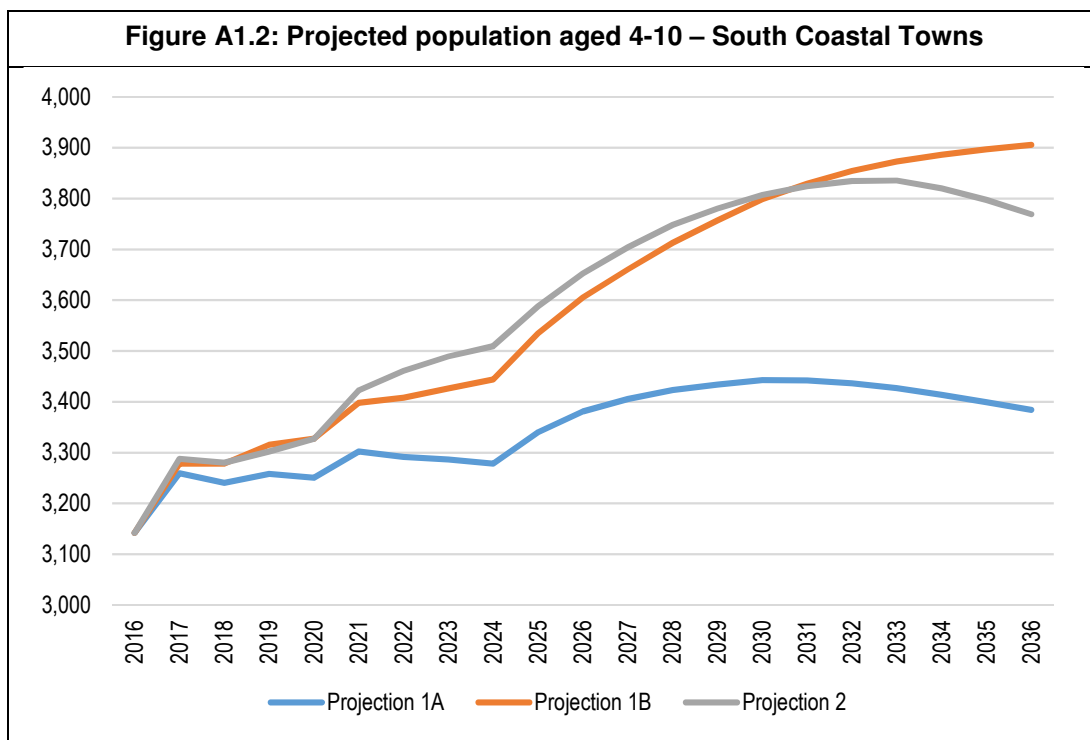
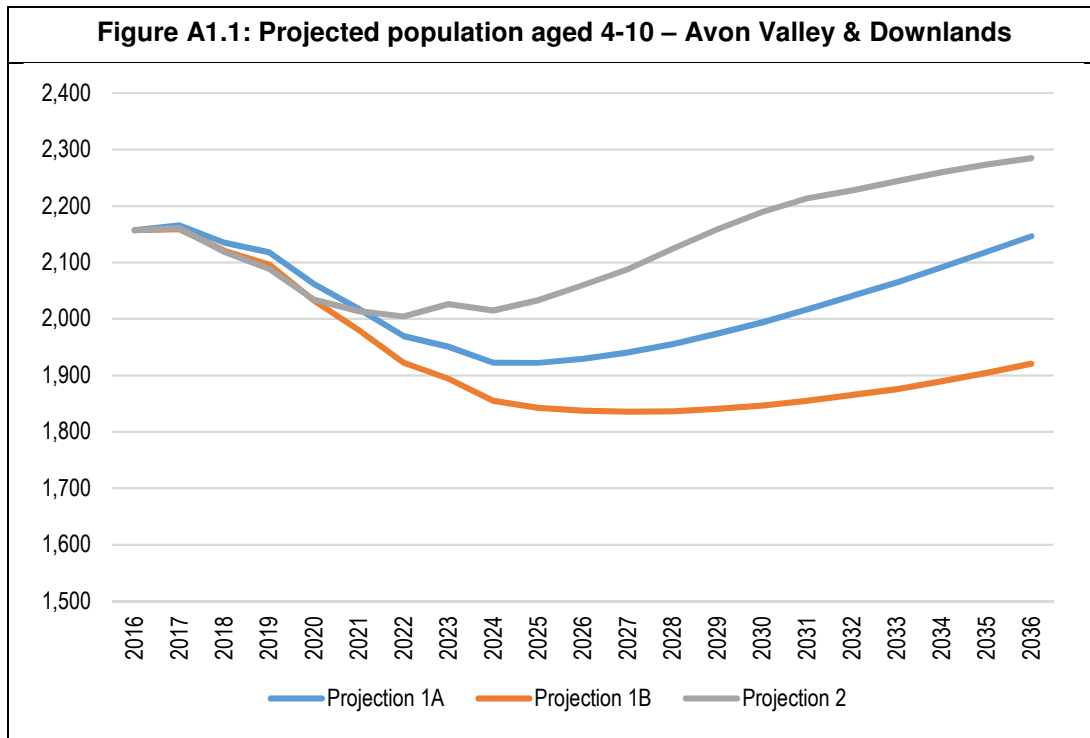
Source: Demographic projections and Housing LIN

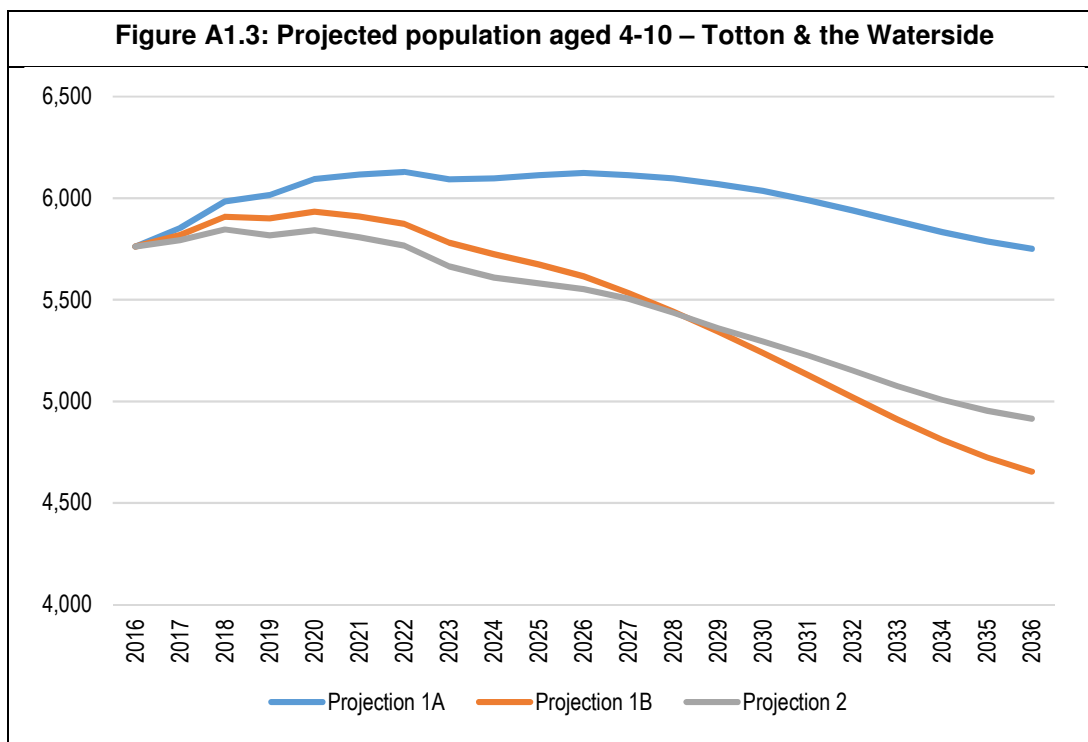
- 4.18 The total need for specialist accommodation (excluding registered care) can be compared with the total housing delivery proposed in the housing trajectory to see what proportion of new homes might need to be housing for older people. The proportions in each area are shown below, with the analysis suggesting a need for around a fifth of homes to be specialist housing; the analysis also indicates a slightly higher proportion in the South Coastal Towns and a lower proportion in Avon Valley & Downlands:
- Avon Valley & Downlands – 16%
 - South Coastal Towns – 26%
 - Totton & the Waterside – 20%
 - New Forest (ex. NP) – 21%
- 4.19 With regard to the C2 (Registered care) need, it should be remembered that this figure is bedspaces and not dwellings; it would be normal to consider C2 need and supply separately from other needs (for example in a five-year housing land supply assessment). However, there is arguably some merit in considering how the bedspace need might translate into dwellings, particularly if the Council were to be including C2 needs within the housing land supply calculations.
- 4.20 There is no fixed methodology for making such a conversion, although some local authorities have considered the occupancy ratings of C3 specialist accommodation; this has typically shown around 1.4 people per dwelling. If this figure were to be applied to the C2 need shown above (970 bedspaces) then the equivalent dwelling figure would be 693 dwellings (2016-36) – this is 35 dwellings per annum. It should be remembered that this figure is not included within the main projections developed in this report.

Summary

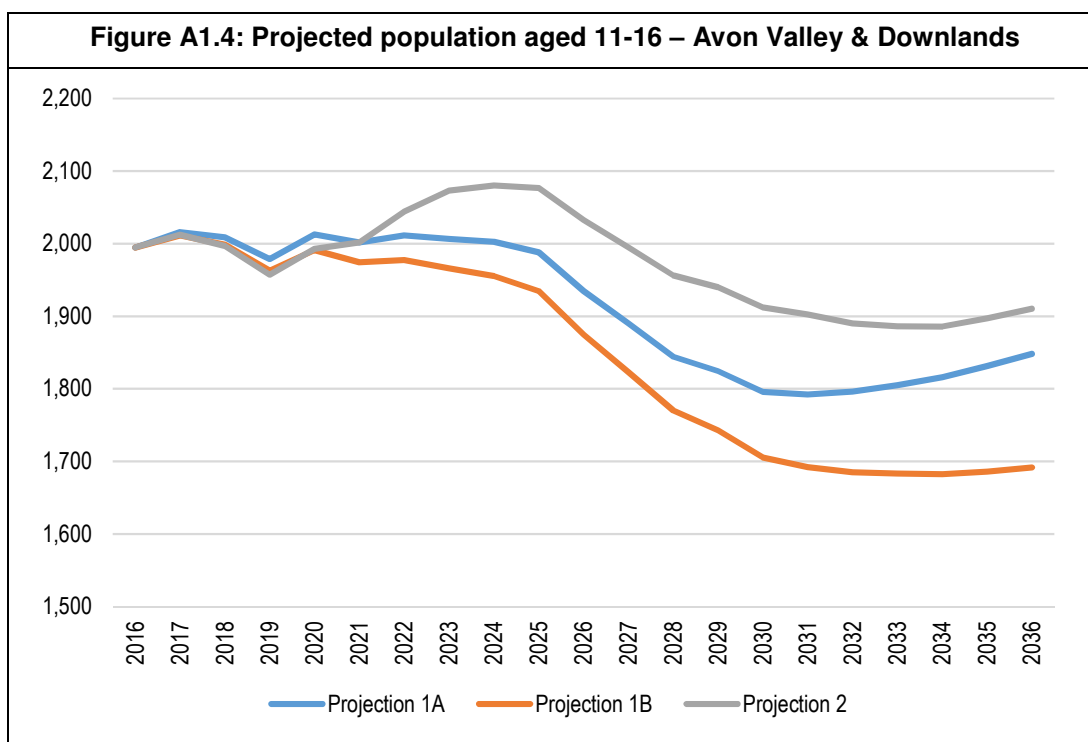
- 4.21 The final section of the report has looked at the potential need for specialist housing for older people. This analysis updates information provided in the 2014 Strategic Housing Market Assessment (SHMA).
- 4.22 The older person population of the New Forest is proportionately larger than in a range of comparator area (Hampshire, the South East and England), with a particular concentration in older age groups (aged 75+) and the South Coastal Towns sub-area. The older person population is also projected to increase notably in the future, although increases are projected to be of a lesser scale than in other areas (partly linked to the New Forest already having a larger older person population).
- 4.23 The main analysis focussed on looking at future need for specialist housing (sheltered/extra-care) linked to the projections developed in this report. Using assumptions from the Housing and Learning Information Network (Housing LIN) it was estimated that there is a need for 2,175 additional units of older person specialist accommodation (in a C3 use class) in the 2016-36 period, along with 970 registered care bedspaces (C2 use class) – the first of these figures represents around a fifth of the housing being proposed through the housing trajectory.

Appendix 1: Additional Projection Outputs





Source: Demographic projections



Source: Demographic projections

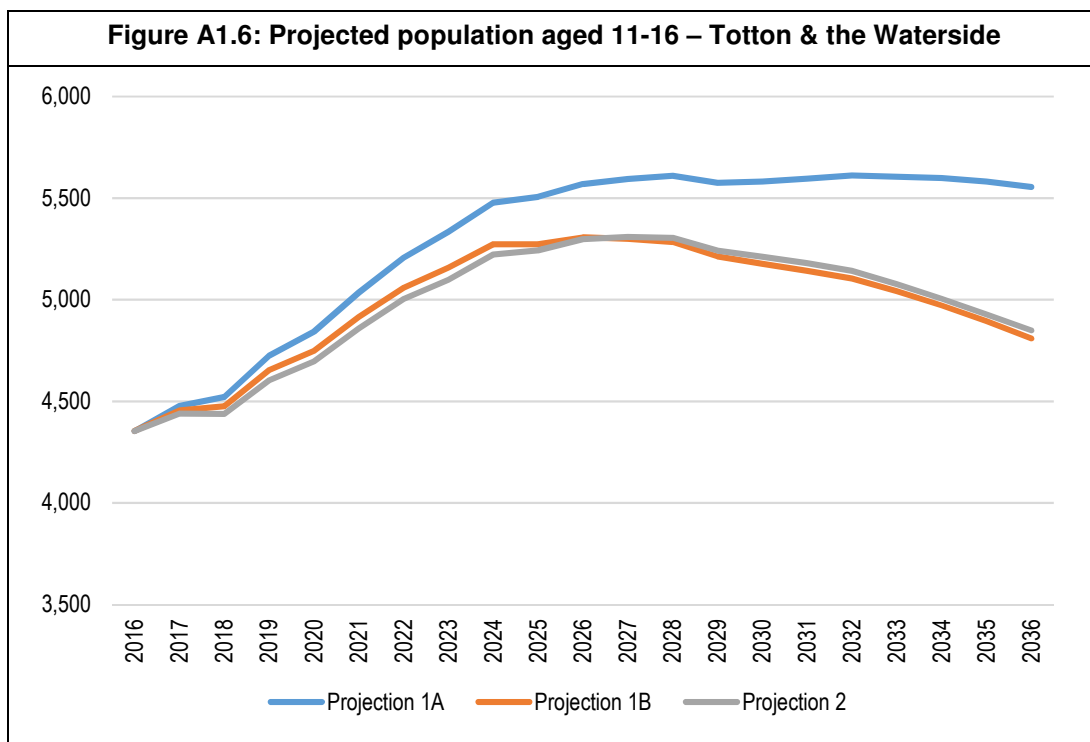
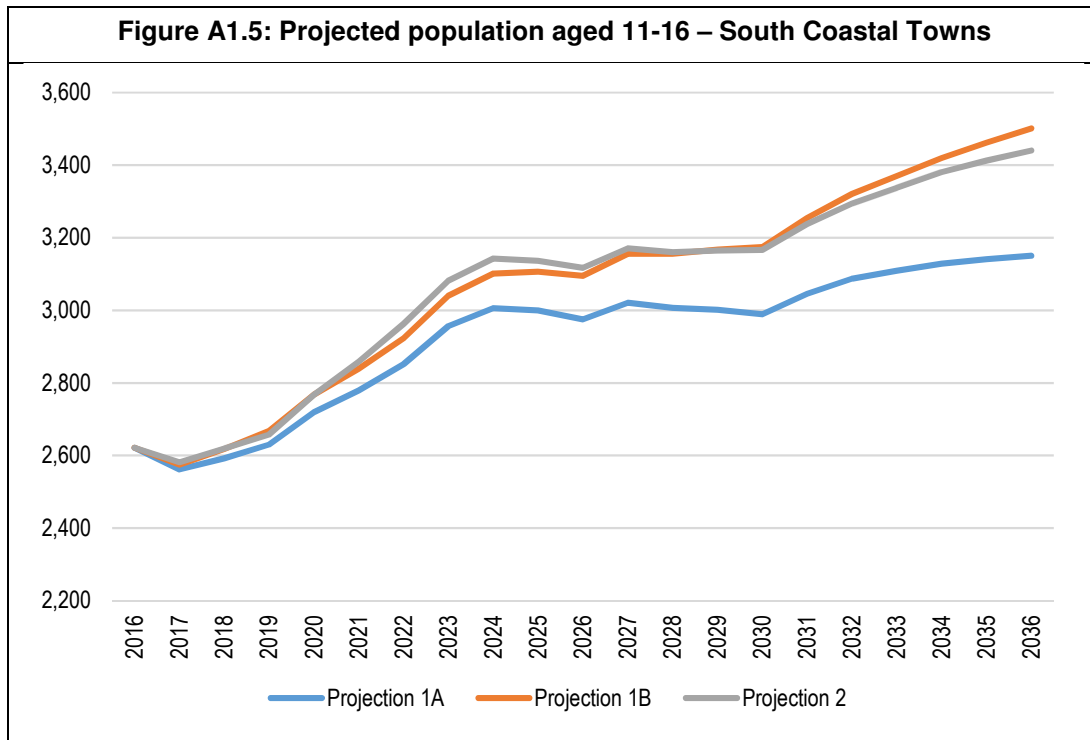
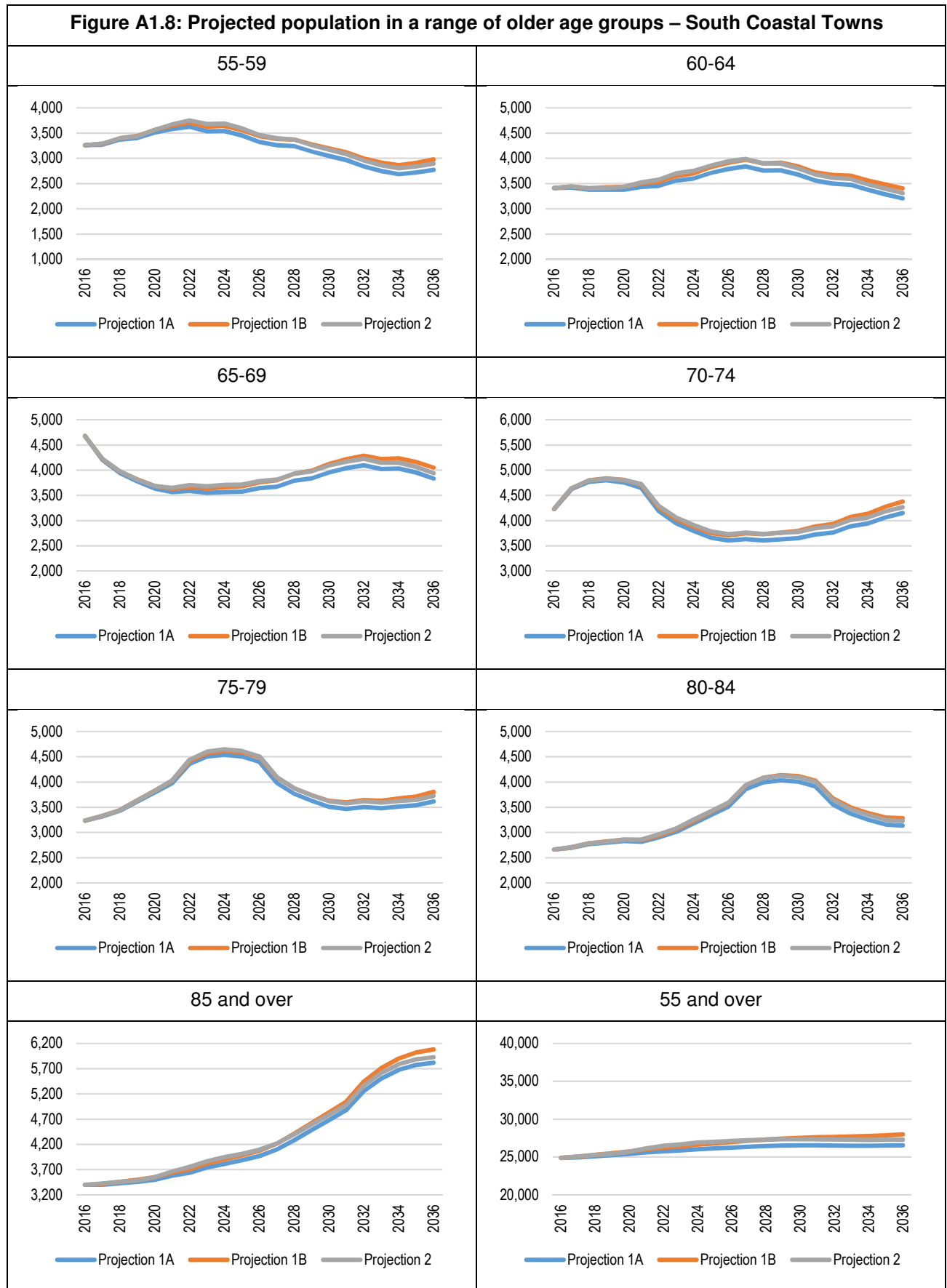


Figure A1.7: Projected population in a range of older age groups – Avon Valley & Downlands



Source: Demographic projections



Source: Demographic projections

Figure A1.9: Projected population in a range of older age groups – Totton & the Waterside



Source: Demographic projections

Appendix 2: Detailed Population Projection Outputs

PROJECTION 1A – Avon Valley & Downlands

Components of change

	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36
Births	219	218	219	221	224	227	230	233	237	240	244	248	252	257	261	264	267	270	272	274
Deaths	279	279	284	288	288	292	294	299	301	308	308	315	318	323	330	335	342	348	355	363
Natural change	-60	-60	-65	-67	-65	-65	-64	-66	-64	-69	-64	-67	-66	-66	-68	-70	-75	-78	-83	-89
In-migration	1,321	1,328	1,332	1,337	1,341	1,346	1,352	1,358	1,365	1,372	1,380	1,388	1,397	1,405	1,412	1,419	1,426	1,432	1,437	1,442
Out-migration	1,092	1,094	1,092	1,094	1,096	1,098	1,101	1,105	1,110	1,117	1,123	1,129	1,134	1,141	1,147	1,150	1,151	1,156	1,162	1,167
Net migration	229	234	239	242	245	249	251	253	255	256	257	260	263	264	265	269	275	276	276	275

Population (broad age groups)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
Age 0-14	4,492	4,442	4,420	4,364	4,328	4,310	4,283	4,274	4,234	4,207	4,181	4,187	4,186	4,213	4,251	4,293	4,339	4,388	4,438	4,488	4,538
Age 15-29	3,735	3,814	3,874	3,991	4,059	4,089	4,136	4,199	4,255	4,284	4,318	4,344	4,329	4,302	4,292	4,249	4,199	4,176	4,118	4,081	4,055
Age 30-44	4,019	3,943	3,854	3,787	3,732	3,746	3,745	3,746	3,759	3,776	3,816	3,839	3,925	4,007	4,045	4,139	4,221	4,296	4,420	4,485	4,517
Age 45-59	6,083	6,083	6,113	6,072	6,080	6,008	5,942	5,821	5,734	5,629	5,555	5,468	5,360	5,268	5,202	5,064	4,997	4,912	4,851	4,812	4,837
Age 60-74	5,485	5,616	5,717	5,841	5,906	6,006	5,985	6,050	6,158	6,309	6,393	6,474	6,566	6,660	6,744	6,871	6,893	6,946	6,924	6,945	6,888
Age 75+	3,385	3,470	3,563	3,660	3,787	3,913	4,165	4,352	4,490	4,616	4,745	4,890	5,028	5,141	5,255	5,369	5,535	5,667	5,831	5,964	6,125
Total population	27,199	27,367	27,541	27,716	27,892	28,072	28,256	28,443	28,630	28,821	29,008	29,201	29,393	29,590	29,788	29,985	30,184	30,384	30,582	30,775	30,961
Change from previous year		168	173	175	176	180	184	187	187	190	187	193	193	197	198	197	199	200	198	193	186
Households	11,656	11,758	11,867	11,977	12,091	12,218	12,342	12,466	12,602	12,734	12,874	13,021	13,156	13,306	13,441	13,585	13,719	13,841	13,972	14,088	14,207
Change from previous year		102	109	110	114	126	124	124	135	132	140	147	135	149	135	144	134	123	130	116	119
Dwelling need		106	112	114	118	131	128	128	140	137	144	151	140	154	140	149	138	127	134	120	123
Working-age population	14,987	15,176	15,368	15,612	15,881	15,986	16,036	16,043	16,059	16,078	16,176	16,408	16,543	16,525	16,461	16,395	16,298	16,264	16,216	16,161	16,130
Change from previous year		190	192	244	269	105	50	7	16	19	97	232	135	-18	-64	-66	-97	-34	-48	-56	-31
Pensionable-age population	7,380	7,401	7,432	7,385	7,345	7,454	7,604	7,808	7,984	8,192	8,305	8,287	8,335	8,547	8,777	8,998	9,248	9,433	9,628	9,824	9,989
Change from previous year		22	31	-47	-40	109	150	204	176	208	113	-18	48	212	230	221	250	185	194	197	165

PROJECTION 1A – South Coastal Towns

Components of change

	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36
Births	394	399	398	405	409	409	412	410	409	408	405	404	401	399	396	394	392	392	392	392
Deaths	783	767	765	759	760	752	749	748	749	749	754	758	761	770	777	786	796	805	813	818
Natural change	-389	-368	-367	-353	-351	-342	-337	-338	-340	-341	-349	-354	-361	-372	-381	-392	-403	-413	-421	-426
In-migration	2,350	2,365	2,374	2,385	2,394	2,406	2,417	2,429	2,445	2,463	2,481	2,500	2,520	2,540	2,558	2,577	2,595	2,611	2,627	2,641
Out-migration	1,949	1,956	1,955	1,961	1,964	1,969	1,977	1,986	1,997	2,011	2,025	2,038	2,050	2,067	2,082	2,093	2,101	2,114	2,129	2,144
Net migration	401	409	419	424	430	436	440	444	448	451	455	462	470	473	476	484	494	498	497	496

Population (broad age groups)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
Age 0-14	6,466	6,544	6,635	6,752	6,820	6,931	6,975	7,034	7,050	7,118	7,118	7,119	7,111	7,163	7,194	7,202	7,204	7,198	7,191	7,178	7,161
Age 15-29	6,474	6,442	6,326	6,197	6,157	6,038	6,009	5,981	5,986	5,922	5,921	5,969	6,008	5,979	5,975	6,030	6,108	6,201	6,315	6,381	6,480
Age 30-44	6,463	6,395	6,418	6,456	6,513	6,612	6,732	6,827	6,916	6,986	7,036	7,088	7,104	7,156	7,199	7,148	7,123	7,031	6,917	6,876	6,765
Age 45-59	9,727	9,707	9,692	9,610	9,540	9,397	9,248	9,038	8,859	8,704	8,531	8,368	8,315	8,167	8,098	8,082	8,024	8,051	8,098	8,178	8,292
Age 60-74	12,318	12,250	12,094	11,962	11,768	11,645	11,233	11,063	10,961	10,948	11,039	11,148	11,157	11,235	11,288	11,324	11,360	11,390	11,349	11,306	11,195
Age 75+	9,296	9,419	9,631	9,873	10,125	10,378	10,900	11,257	11,533	11,737	11,879	11,940	12,045	12,149	12,197	12,260	12,318	12,359	12,446	12,473	12,572
Total population	50,744	50,756	50,797	50,850	50,922	51,002	51,096	51,199	51,306	51,415	51,525	51,631	51,740	51,849	51,950	52,046	52,139	52,230	52,316	52,393	52,464
Change from previous year		12	41	53	71	80	95	103	107	109	111	106	108	109	101	96	92	91	86	77	71
Households	23,920	23,926	23,966	24,008	24,048	24,098	24,148	24,213	24,278	24,348	24,425	24,498	24,565	24,640	24,709	24,770	24,830	24,880	24,921	24,965	25,008
Change from previous year		6	40	41	40	50	50	65	65	70	77	73	67	75	69	61	60	50	41	44	43
Dwelling need		7	42	44	43	53	53	69	69	74	82	77	71	79	73	64	64	53	44	46	46
Working-age population	24,973	25,157	25,292	25,536	25,744	25,758	25,659	25,623	25,589	25,546	25,615	25,964	26,190	26,192	26,057	25,961	25,873	25,756	25,709	25,717	25,664
Change from previous year		184	135	244	208	14	-99	-37	-34	-42	69	349	226	3	-136	-96	-88	-116	-47	8	-53
Pensionable-age population	18,854	18,624	18,446	18,164	17,903	17,898	17,980	18,073	18,156	18,292	18,267	18,027	17,909	18,028	18,214	18,378	18,552	18,760	18,899	18,975	19,112
Change from previous year		-230	-179	-281	-261	-6	82	93	83	136	-24	-240	-118	118	186	165	173	208	139	76	138

PROJECTION 1A – Totton & the Waterside

Components of change

	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36
Births	719	720	716	719	718	714	710	701	692	684	675	668	661	658	657	655	659	661	668	675
Deaths	587	591	599	608	616	623	632	642	652	665	674	688	699	715	732	746	765	780	802	819
Natural change	133	129	117	112	103	91	78	59	40	19	1	-21	-38	-58	-75	-90	-106	-120	-134	-144
In-migration	3,679	3,698	3,706	3,714	3,721	3,732	3,741	3,752	3,765	3,782	3,799	3,818	3,838	3,858	3,877	3,895	3,914	3,931	3,947	3,961
Out-migration	3,080	3,087	3,082	3,085	3,086	3,088	3,094	3,100	3,110	3,124	3,138	3,149	3,160	3,178	3,194	3,204	3,208	3,221	3,239	3,257
Net migration	599	612	623	629	635	643	647	652	655	658	662	669	678	680	683	692	706	710	708	705

Population (broad age groups)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
Age 0-14	11,711	11,956	12,151	12,362	12,547	12,639	12,782	12,817	12,877	12,872	12,853	12,773	12,729	12,686	12,641	12,576	12,515	12,454	12,397	12,346	12,303
Age 15-29	10,676	10,435	10,211	10,043	9,945	9,903	9,854	9,948	9,941	9,995	10,087	10,327	10,528	10,709	10,886	11,083	11,329	11,525	11,732	11,914	11,985
Age 30-44	11,714	11,780	11,922	12,100	12,175	12,357	12,517	12,587	12,654	12,684	12,667	12,531	12,394	12,278	12,144	12,019	11,788	11,606	11,466	11,365	11,336
Age 45-59	14,867	15,024	15,053	14,993	15,025	14,931	14,737	14,563	14,437	14,347	14,297	14,321	14,350	14,343	14,430	14,397	14,480	14,618	14,804	14,913	15,119
Age 60-74	12,238	12,545	12,909	13,206	13,445	13,755	13,888	14,198	14,554	14,928	15,289	15,570	15,824	16,104	16,353	16,665	16,873	16,940	16,930	16,988	16,928
Age 75+	7,027	7,224	7,459	7,744	8,053	8,346	8,889	9,281	9,645	9,979	10,291	10,625	10,971	11,316	11,607	11,930	12,288	12,730	13,139	13,517	13,936
Total population	68,232	68,965	69,706	70,448	71,191	71,931	72,668	73,395	74,108	74,805	75,484	76,147	76,796	77,438	78,061	78,670	79,273	79,875	80,468	81,044	81,607
Change from previous year		733	741	742	743	740	737	727	713	697	679	664	649	641	623	609	603	601	593	576	563
Households	29,226	29,642	30,064	30,488	30,897	31,305	31,698	32,098	32,512	32,919	33,335	33,718	34,123	34,529	34,928	35,339	35,722	36,135	36,521	36,911	37,310
Change from previous year		416	422	424	409	408	392	400	414	407	417	383	406	406	399	412	382	413	385	390	399
Dwelling need		424	429	432	416	415	399	407	421	414	424	389	413	413	406	419	389	421	392	397	406
Working-age population	39,979	40,427	40,814	41,394	41,940	42,194	42,423	42,546	42,674	42,783	43,124	43,801	44,368	44,443	44,481	44,492	44,532	44,605	44,730	44,856	44,950
Change from previous year		448	387	580	545	255	229	123	127	110	341	677	567	75	37	11	40	73	126	126	94
Pensionable-age population	15,798	15,893	15,998	15,970	15,953	16,254	16,674	17,140	17,698	18,234	18,585	18,600	18,768	19,385	20,017	20,662	21,291	21,877	22,403	22,904	23,417
Change from previous year		95	104	-27	-18	302	420	466	558	537	351	14	168	617	632	645	629	587	526	501	513

PROJECTION 1A – New Forest (National Park)

Components of change

	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36
Births	217	220	223	229	234	239	246	252	258	263	268	271	275	276	277	277	275	275	272	270
Deaths	392	390	392	398	397	402	406	412	415	419	425	432	438	446	456	467	475	489	500	510
Natural change	-174	-170	-169	-169	-164	-163	-160	-161	-157	-155	-158	-161	-163	-170	-179	-190	-200	-214	-228	-240
In-migration	1,488	1,497	1,502	1,508	1,514	1,521	1,527	1,535	1,544	1,555	1,566	1,577	1,588	1,599	1,609	1,618	1,627	1,635	1,642	1,648
Out-migration	1,218	1,221	1,219	1,221	1,222	1,224	1,228	1,233	1,239	1,248	1,256	1,263	1,270	1,279	1,286	1,291	1,293	1,299	1,306	1,313
Net migration	271	276	284	288	292	296	299	302	305	307	310	314	318	320	323	327	333	336	336	335

Population (broad age groups)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
Age 0-14	4,274	4,216	4,197	4,164	4,139	4,131	4,106	4,089	4,071	4,076	4,095	4,127	4,178	4,265	4,377	4,441	4,501	4,557	4,608	4,651	4,687
Age 15-29	4,121	4,236	4,263	4,315	4,375	4,366	4,383	4,411	4,417	4,425	4,391	4,348	4,267	4,148	4,038	4,015	3,958	3,939	3,905	3,879	3,864
Age 30-44	3,990	3,825	3,742	3,663	3,631	3,671	3,722	3,766	3,835	3,889	3,996	4,097	4,209	4,350	4,446	4,529	4,647	4,688	4,748	4,807	4,801
Age 45-59	7,692	7,657	7,583	7,531	7,383	7,223	7,012	6,794	6,558	6,312	6,066	5,867	5,689	5,485	5,326	5,183	5,029	4,954	4,884	4,872	4,925
Age 60-74	7,968	8,109	8,176	8,205	8,238	8,312	8,241	8,236	8,344	8,454	8,548	8,617	8,682	8,747	8,795	8,807	8,811	8,767	8,747	8,616	8,483
Age 75+	4,630	4,727	4,916	5,114	5,343	5,535	5,907	6,212	6,423	6,642	6,854	7,043	7,229	7,411	7,575	7,726	7,891	8,066	8,199	8,376	8,535
Total population	32,675	32,771	32,876	32,991	33,109	33,237	33,370	33,509	33,650	33,797	33,949	34,100	34,252	34,407	34,557	34,700	34,837	34,971	35,092	35,200	35,295
Change from previous year		96	106	114	118	128	133	139	141	147	151	151	152	155	150	143	137	134	121	108	95
Households	13,965	14,043	14,134	14,228	14,317	14,412	14,516	14,623	14,732	14,841	14,949	15,061	15,172	15,278	15,384	15,470	15,556	15,630	15,696	15,757	15,805
Change from previous year		78	91	94	89	95	103	107	109	109	108	112	111	106	106	86	86	75	66	60	48
Dwelling need		83	97	100	94	101	110	114	116	116	114	119	117	113	112	92	91	79	70	64	51
Working-age population	17,598	17,681	17,795	17,978	18,167	18,152	18,084	18,015	17,928	17,879	17,857	18,029	18,110	17,935	17,727	17,473	17,262	17,079	16,940	16,810	16,684
Change from previous year		84	114	183	188	-14	-68	-69	-87	-49	-22	172	81	-175	-208	-254	-211	-183	-139	-131	-125
Pensionable-age population	10,491	10,525	10,570	10,518	10,474	10,637	10,841	11,068	11,306	11,514	11,677	11,633	11,668	11,944	12,213	12,497	12,781	13,039	13,245	13,435	13,614
Change from previous year		34	45	-51	-44	163	204	227	238	208	163	-44	35	275	269	284	284	258	205	190	180

PROJECTION 1B – Avon Valley & Downlands

Components of change

	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36
Births	219	217	215	216	216	218	218	220	221	222	224	226	228	232	234	236	237	238	239	240
Deaths	279	278	283	286	286	289	291	295	297	303	302	309	311	315	321	326	333	338	344	351
Natural change	-60	-61	-67	-70	-70	-71	-73	-76	-76	-81	-78	-82	-83	-84	-87	-90	-95	-100	-105	-111
In-migration	1,270	1,275	1,279	1,284	1,286	1,290	1,295	1,302	1,307	1,318	1,323	1,332	1,339	1,347	1,356	1,362	1,368	1,376	1,384	1,393
Out-migration	1,134	1,138	1,136	1,138	1,141	1,143	1,147	1,150	1,157	1,161	1,170	1,174	1,181	1,188	1,192	1,196	1,197	1,201	1,205	1,207
Net migration	136	137	142	146	145	147	148	152	151	157	154	158	159	159	163	166	171	175	180	186

Population (broad age groups)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
Age 0-14	4,492	4,428	4,389	4,316	4,262	4,223	4,174	4,143	4,080	4,028	3,978	3,958	3,930	3,929	3,938	3,953	3,970	3,991	4,014	4,038	4,065
Age 15-29	3,735	3,785	3,816	3,904	3,946	3,950	3,972	4,011	4,045	4,052	4,067	4,074	4,044	4,001	3,974	3,913	3,843	3,800	3,723	3,667	3,624
Age 30-44	4,019	3,923	3,813	3,724	3,646	3,635	3,608	3,581	3,566	3,553	3,564	3,556	3,609	3,658	3,664	3,728	3,783	3,830	3,929	3,971	3,982
Age 45-59	6,083	6,068	6,084	6,028	6,020	5,933	5,851	5,715	5,612	5,491	5,401	5,296	5,172	5,062	4,977	4,819	4,733	4,626	4,542	4,479	4,480
Age 60-74	5,485	5,606	5,697	5,810	5,864	5,952	5,918	5,969	6,063	6,199	6,268	6,333	6,409	6,488	6,556	6,667	6,673	6,711	6,676	6,683	6,616
Age 75+	3,385	3,465	3,552	3,643	3,764	3,884	4,129	4,308	4,438	4,555	4,676	4,812	4,941	5,043	5,147	5,251	5,405	5,524	5,675	5,795	5,943
Total population	27,199	27,275	27,350	27,425	27,501	27,576	27,652	27,727	27,803	27,878	27,954	28,029	28,105	28,180	28,256	28,332	28,407	28,483	28,558	28,633	28,709
Change from previous year		76	75	75	76	75	76	75	76	75	75	76	76	75	75	76	75	75	76	75	75
Households	11,656	11,725	11,798	11,871	11,948	12,035	12,118	12,200	12,292	12,381	12,477	12,578	12,668	12,770	12,858	12,954	13,040	13,114	13,197	13,266	13,341
Change from previous year		69	73	73	77	87	83	82	93	88	97	101	90	102	88	97	86	74	82	70	75
Dwelling need		71	75	76	80	90	86	84	96	91	100	105	93	105	90	100	89	76	85	72	77
Working-age population	14,987	15,110	15,233	15,407	15,606	15,639	15,616	15,550	15,495	15,440	15,467	15,622	15,681	15,589	15,452	15,315	15,146	15,039	14,920	14,796	14,700
Change from previous year		124	123	174	199	33	-23	-66	-55	-54	27	155	59	-92	-137	-137	-170	-106	-119	-125	-95
Pensionable-age population	7,380	7,390	7,409	7,351	7,300	7,397	7,533	7,723	7,883	8,075	8,173	8,143	8,177	8,370	8,580	8,780	9,009	9,172	9,345	9,520	9,664
Change from previous year		10	19	-58	-51	97	136	190	161	192	98	-31	34	193	210	201	229	163	172	175	144

PROJECTION 1B – South Coastal Towns

Components of change

	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36
Births	394	405	411	424	433	439	447	450	453	456	457	459	459	460	460	461	461	463	465	467
Deaths	783	770	771	767	770	764	764	765	767	768	775	780	785	796	804	816	827	839	850	857
Natural change	-389	-365	-360	-343	-337	-326	-317	-315	-314	-312	-318	-321	-326	-336	-344	-355	-366	-376	-385	-390
In-migration	2,534	2,531	2,532	2,531	2,534	2,535	2,540	2,549	2,562	2,577	2,596	2,614	2,632	2,656	2,676	2,697	2,716	2,736	2,756	2,773
Out-migration	1,797	1,818	1,825	1,841	1,849	1,863	1,877	1,887	1,901	1,918	1,931	1,945	1,959	1,972	1,985	1,995	2,003	2,013	2,025	2,037
Net migration	736	713	707	690	684	672	664	662	661	659	665	669	673	684	691	702	713	723	731	736

Population (broad age groups)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
Age 0-14	6,466	6,587	6,721	6,883	6,998	7,158	7,252	7,363	7,433	7,557	7,614	7,674	7,725	7,839	7,930	7,999	8,063	8,116	8,165	8,206	8,240
Age 15-29	6,474	6,549	6,526	6,478	6,507	6,447	6,465	6,478	6,515	6,478	6,501	6,569	6,622	6,607	6,626	6,710	6,822	6,952	7,108	7,224	7,376
Age 30-44	6,463	6,458	6,543	6,643	6,762	6,926	7,113	7,273	7,432	7,571	7,692	7,815	7,908	8,034	8,144	8,157	8,188	8,147	8,082	8,088	8,018
Age 45-59	9,727	9,754	9,782	9,740	9,706	9,598	9,480	9,299	9,149	9,024	8,880	8,748	8,726	8,609	8,576	8,596	8,579	8,652	8,748	8,883	9,060
Age 60-74	12,318	12,293	12,177	12,084	11,926	11,838	11,457	11,318	11,247	11,265	11,387	11,527	11,566	11,673	11,757	11,824	11,890	11,948	11,934	11,919	11,833
Age 75+	9,296	9,450	9,690	9,958	10,235	10,514	11,063	11,446	11,749	11,978	12,147	12,235	12,368	12,500	12,578	12,671	12,763	12,839	12,963	13,028	13,168
Total population	50,744	51,091	51,439	51,787	52,134	52,482	52,829	53,177	53,525	53,873	54,220	54,567	54,915	55,263	55,611	55,958	56,305	56,653	57,000	57,348	57,695
Change from previous year		347	348	347	347	348	347	347	348	348	347	347	348	348	348	347	347	347	348	348	347
Households	23,920	24,056	24,217	24,376	24,527	24,685	24,838	25,003	25,167	25,336	25,510	25,680	25,846	26,018	26,187	26,349	26,511	26,663	26,810	26,963	27,118
Change from previous year		136	161	158	151	159	152	165	164	168	174	170	166	172	169	162	162	153	146	153	156
Dwelling need		144	170	168	160	168	161	175	174	178	184	180	175	182	179	171	171	162	155	162	165
Working-age population	24,973	25,387	25,730	26,174	26,567	26,754	26,812	26,923	27,031	27,127	27,333	27,830	28,198	28,331	28,328	28,368	28,419	28,441	28,540	28,703	28,812
Change from previous year		414	343	444	393	187	58	111	108	95	206	497	368	133	-2	40	51	23	99	163	108
Pensionable-age population	18,854	18,684	18,559	18,326	18,108	18,146	18,272	18,408	18,534	18,713	18,729	18,521	18,439	18,603	18,838	19,054	19,281	19,541	19,735	19,867	20,063
Change from previous year		-170	-125	-233	-218	38	125	136	126	180	15	-208	-82	164	235	216	227	261	194	132	196

PROJECTION 1B – Totton & the Waterside

Components of change

	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36
Births	719	708	691	681	667	650	633	613	593	575	558	543	530	522	517	513	514	515	520	527
Deaths	587	589	594	601	606	612	619	626	634	645	653	665	674	689	703	715	733	747	766	781
Natural change	133	119	96	80	61	39	15	-13	-41	-70	-95	-122	-144	-167	-187	-202	-219	-232	-246	-254
In-migration	3,385	3,404	3,417	3,431	3,445	3,463	3,483	3,506	3,533	3,564	3,594	3,623	3,650	3,682	3,709	3,732	3,751	3,773	3,797	3,819
Out-migration	3,326	3,332	3,323	3,321	3,315	3,311	3,307	3,303	3,301	3,303	3,307	3,310	3,315	3,324	3,332	3,338	3,341	3,351	3,361	3,374
Net migration	59	73	94	110	130	152	176	203	232	261	287	313	335	358	378	393	410	422	436	445

Population (broad age groups)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
Age 0-14	11,711	11,875	11,981	12,095	12,174	12,153	12,176	12,087	12,019	11,883	11,733	11,523	11,348	11,174	11,003	10,818	10,640	10,471	10,315	10,177	10,059
Age 15-29	10,676	10,240	9,833	9,497	9,249	9,076	8,914	8,907	8,820	8,810	8,854	9,057	9,240	9,404	9,556	9,723	9,930	10,078	10,228	10,348	10,352
Age 30-44	11,714	11,657	11,667	11,705	11,633	11,658	11,654	11,560	11,459	11,326	11,147	10,853	10,554	10,284	10,019	9,781	9,454	9,192	8,983	8,831	8,766
Age 45-59	14,867	14,950	14,905	14,771	14,731	14,567	14,306	14,068	13,878	13,723	13,610	13,570	13,533	13,459	13,472	13,364	13,364	13,408	13,491	13,490	13,574
Age 60-74	12,238	12,501	12,818	13,066	13,256	13,513	13,595	13,852	14,152	14,471	14,777	15,004	15,206	15,436	15,637	15,902	16,066	16,091	16,043	16,065	15,975
Age 75+	7,027	7,201	7,414	7,675	7,960	8,228	8,743	9,106	9,443	9,750	10,035	10,341	10,660	10,976	11,238	11,530	11,856	12,263	12,635	12,976	13,354
Total population	68,232	68,425	68,617	68,809	69,002	69,194	69,387	69,580	69,771	69,964	70,156	70,349	70,541	70,734	70,926	71,118	71,311	71,503	71,696	71,888	72,081
Change from previous year	192	192	192	192	193	193	192	192	193	192	193	192	192	192	192	192	193	192	192	192	193
Households	29,226	29,449	29,670	29,891	30,095	30,296	30,481	30,675	30,887	31,099	31,327	31,528	31,756	31,987	32,220	32,472	32,699	32,956	33,189	33,431	33,686
Change from previous year	223	221	221	204	201	185	194	211	212	228	201	227	231	233	252	227	257	233	242	255	
Dwelling need	227	225	225	207	205	189	198	215	216	232	205	231	235	237	256	231	262	237	247	259	
Working-age population	39,979	40,021	40,003	40,181	40,330	40,203	40,064	39,835	39,628	39,424	39,464	39,843	40,129	39,948	39,747	39,529	39,343	39,189	39,086	38,986	38,855
Change from previous year	42	-18	177	149	-127	-139	-229	-207	-204	41	379	286	-181	-201	-217	-186	-154	-103	-100	-131	
Pensionable-age population	15,798	15,843	15,898	15,824	15,762	16,015	16,382	16,794	17,297	17,778	18,079	18,056	18,183	18,742	19,314	19,898	20,464	20,987	21,450	21,889	22,341
Change from previous year	45	55	-74	-62	253	368	412	503	481	301	-23	127	559	573	583	566	523	463	439	452	

PROJECTION 1B – New Forest (National Park)

Components of change

	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36
Births	217	219	221	226	230	233	238	243	247	251	253	255	257	257	256	255	252	250	247	244
Deaths	392	390	391	396	396	400	403	409	411	414	420	426	431	438	448	458	465	479	489	498
Natural change	-174	-170	-170	-171	-166	-167	-164	-166	-164	-163	-167	-171	-174	-182	-192	-203	-214	-229	-242	-255
In-migration	1,460	1,464	1,465	1,468	1,469	1,474	1,478	1,484	1,491	1,501	1,511	1,522	1,534	1,547	1,561	1,574	1,585	1,600	1,615	1,629
Out-migration	1,241	1,248	1,249	1,253	1,258	1,262	1,268	1,274	1,282	1,292	1,300	1,307	1,314	1,321	1,325	1,326	1,327	1,327	1,328	1,329
Net migration	219	216	216	215	211	211	210	211	208	209	211	216	220	227	236	248	258	273	287	300

Population (broad age groups)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
Age 0-14	4,274	4,210	4,182	4,139	4,102	4,081	4,041	4,009	3,974	3,961	3,960	3,972	4,002	4,067	4,157	4,199	4,238	4,272	4,305	4,330	4,351
Age 15-29	4,121	4,220	4,229	4,262	4,302	4,272	4,267	4,274	4,260	4,246	4,192	4,131	4,033	3,899	3,774	3,738	3,670	3,642	3,602	3,574	3,560
Age 30-44	3,990	3,816	3,722	3,629	3,582	3,606	3,639	3,662	3,710	3,741	3,824	3,900	3,984	4,098	4,168	4,226	4,322	4,342	4,384	4,427	4,409
Age 45-59	7,692	7,648	7,563	7,499	7,339	7,165	6,940	6,708	6,458	6,196	5,935	5,721	5,528	5,309	5,135	4,979	4,812	4,724	4,641	4,617	4,660
Age 60-74	7,968	8,102	8,160	8,180	8,203	8,264	8,181	8,162	8,255	8,348	8,425	8,477	8,524	8,571	8,602	8,599	8,589	8,532	8,503	8,364	8,228
Age 75+	4,630	4,724	4,908	5,101	5,325	5,510	5,874	6,171	6,374	6,583	6,785	6,964	7,139	7,310	7,462	7,602	7,756	7,919	8,042	8,208	8,357
Total population	32,675	32,719	32,764	32,809	32,854	32,898	32,942	32,987	33,031	33,075	33,120	33,164	33,209	33,254	33,299	33,343	33,387	33,432	33,476	33,521	33,566
Change from previous year		44	45	45	44	44	44	45	44	44	45	44	45	45	44	44	45	45	44	44	45
Households	13,965	14,025	14,094	14,162	14,223	14,287	14,357	14,429	14,500	14,570	14,637	14,708	14,777	14,841	14,906	14,954	15,003	15,044	15,080	15,115	15,143
Change from previous year		60	69	68	61	64	70	72	72	70	67	71	69	64	65	48	50	40	36	35	28
Dwelling need		63	73	73	65	68	74	76	76	74	71	76	73	67	69	51	53	43	38	37	30
Working-age population	17,598	17,645	17,716	17,851	17,987	17,915	17,788	17,657	17,508	17,393	17,303	17,403	17,414	17,174	16,905	16,596	16,335	16,106	15,929	15,768	15,622
Change from previous year		48	71	134	136	-72	-128	-131	-149	-115	-90	101	11	-241	-269	-309	-260	-230	-177	-160	-146
Pensionable-age population	10,491	10,517	10,552	10,491	10,437	10,587	10,777	10,988	11,210	11,400	11,545	11,486	11,505	11,759	12,007	12,270	12,534	12,771	12,958	13,132	13,298
Change from previous year		26	36	-61	-54	150	190	211	221	190	145	-59	19	254	248	263	264	237	187	174	166

PROJECTION 2 – Avon Valley & Downlands

Components of change

	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36
Births	219	217	215	214	216	227	240	254	262	269	278	284	291	298	302	302	298	294	288	283
Deaths	279	278	282	286	286	292	297	306	309	317	318	326	329	335	341	345	350	354	359	365
Natural change	-60	-61	-68	-72	-70	-65	-58	-52	-47	-48	-40	-41	-38	-36	-39	-43	-52	-60	-70	-81
In-migration	1,282	1,244	1,237	1,360	1,533	1,655	1,660	1,468	1,485	1,486	1,451	1,462	1,425	1,384	1,309	1,220	1,250	1,249	1,285	1,289
Out-migration	1,124	1,163	1,170	1,076	939	846	850	1,015	1,012	1,024	1,066	1,069	1,111	1,158	1,230	1,311	1,293	1,304	1,285	1,291
Net migration	159	81	67	284	594	808	810	452	472	462	385	393	314	226	79	-91	-44	-55	0	-2

Population (broad age groups)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
Age 0-14	4,492	4,431	4,384	4,299	4,266	4,300	4,362	4,447	4,447	4,468	4,489	4,531	4,571	4,627	4,681	4,718	4,727	4,742	4,751	4,765	4,774
Age 15-29	3,735	3,792	3,806	3,871	3,955	4,094	4,309	4,536	4,645	4,727	4,810	4,857	4,861	4,826	4,778	4,647	4,452	4,298	4,117	3,989	3,879
Age 30-44	4,019	3,928	3,806	3,701	3,652	3,738	3,859	3,986	4,050	4,121	4,215	4,279	4,407	4,516	4,562	4,639	4,672	4,706	4,777	4,786	4,754
Age 45-59	6,083	6,072	6,079	6,011	6,024	6,005	6,023	5,983	5,924	5,850	5,807	5,740	5,655	5,574	5,510	5,353	5,248	5,130	5,036	4,970	4,969
Age 60-74	5,485	5,609	5,694	5,799	5,866	6,002	6,040	6,168	6,303	6,486	6,602	6,707	6,822	6,930	7,017	7,129	7,113	7,129	7,066	7,052	6,958
Age 75+	3,385	3,466	3,550	3,637	3,766	3,914	4,203	4,428	4,580	4,721	4,865	5,020	5,169	5,287	5,401	5,503	5,644	5,755	5,896	6,012	6,157
Total population	27,199	27,297	27,318	27,317	27,529	28,053	28,796	29,549	29,950	30,375	30,788	31,133	31,485	31,760	31,950	31,989	31,856	31,760	31,644	31,575	31,492
Change from previous year		98	20	0	212	524	743	752	401	425	414	344	352	276	190	40	-134	-96	-115	-70	-83
Households	11,656	11,733	11,786	11,832	11,958	12,208	12,538	12,872	13,090	13,311	13,539	13,748	13,948	14,133	14,268	14,357	14,371	14,386	14,400	14,415	14,430
Change from previous year		77	53	46	126	251	330	334	217	222	228	208	201	184	135	89	14	15	14	15	15
Dwelling need		80	55	47	130	259	340	345	225	229	235	215	207	190	140	92	15	15	14	15	15
Working-age population	14,987	15,126	15,209	15,330	15,627	15,979	16,428	16,832	16,991	17,166	17,411	17,742	17,977	17,993	17,899	17,697	17,342	17,083	16,802	16,554	16,332
Change from previous year		140	83	121	297	353	448	405	159	175	245	331	236	16	-94	-201	-355	-260	-281	-247	-222
Pensionable-age population	7,380	7,393	7,405	7,339	7,303	7,452	7,667	7,940	8,143	8,383	8,526	8,523	8,589	8,816	9,051	9,259	9,473	9,624	9,781	9,945	10,075
Change from previous year		13	13	-67	-35	149	215	273	203	240	142	-3	66	227	235	208	214	151	157	164	130

PROJECTION 2 – South Coastal Towns

Components of change

	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36
Births	394	408	411	419	433	448	464	469	473	471	469	467	462	457	451	445	440	435	431	425
Deaths	783	772	771	765	770	769	772	774	776	774	779	782	784	792	797	807	815	825	833	837
Natural change	-389	-364	-360	-346	-337	-321	-308	-305	-303	-303	-310	-315	-322	-335	-347	-361	-376	-389	-402	-411
In-migration	2,622	2,450	2,386	2,665	2,794	2,775	2,584	2,548	2,414	2,467	2,479	2,452	2,469	2,503	2,532	2,553	2,589	2,568	2,585	2,600
Out-migration	1,724	1,885	1,945	1,730	1,636	1,667	1,841	1,888	2,022	2,007	2,026	2,076	2,091	2,097	2,102	2,112	2,105	2,149	2,163	2,177
Net migration	898	565	441	934	1,157	1,108	743	660	392	460	453	376	378	406	430	442	484	420	421	423

Population (broad age groups)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
Age 0-14	6,466	6,607	6,724	6,853	6,997	7,217	7,373	7,504	7,586	7,689	7,731	7,773	7,793	7,870	7,925	7,955	7,976	7,981	7,969	7,947	7,913
Age 15-29	6,474	6,601	6,529	6,397	6,505	6,590	6,736	6,761	6,783	6,650	6,600	6,593	6,545	6,442	6,382	6,388	6,424	6,502	6,601	6,664	6,770
Age 30-44	6,463	6,489	6,548	6,597	6,759	7,015	7,292	7,478	7,649	7,748	7,839	7,931	7,978	8,047	8,100	8,063	8,045	7,950	7,803	7,716	7,546
Age 45-59	9,727	9,777	9,784	9,704	9,706	9,663	9,602	9,430	9,279	9,119	8,950	8,793	8,738	8,587	8,523	8,515	8,469	8,517	8,579	8,678	8,817
Age 60-74	12,318	12,314	12,179	12,051	11,924	11,900	11,576	11,448	11,379	11,362	11,459	11,569	11,566	11,630	11,672	11,700	11,728	11,752	11,697	11,641	11,515
Age 75+	9,296	9,465	9,690	9,933	10,235	10,561	11,156	11,548	11,850	12,049	12,195	12,258	12,358	12,457	12,503	12,567	12,628	12,676	12,760	12,784	12,880
Total population	50,744	51,253	51,454	51,536	52,126	52,947	53,734	54,169	54,526	54,616	54,774	54,917	54,978	55,034	55,104	55,188	55,269	55,378	55,410	55,430	55,442
Change from previous year		509	201	82	590	821	787	435	356	90	158	143	61	56	71	84	81	109	31	20	12
Households	23,920	24,119	24,224	24,278	24,523	24,868	25,197	25,400	25,569	25,635	25,734	25,824	25,875	25,927	25,980	26,031	26,083	26,137	26,150	26,165	26,178
Change from previous year		199	105	54	245	346	329	203	169	66	99	90	51	52	53	52	52	53	13	15	14
Dwelling need		211	111	57	259	366	348	215	178	69	105	95	54	55	56	55	55	56	14	15	15
Working-age population	24,973	25,497	25,739	26,000	26,561	27,073	27,429	27,592	27,697	27,608	27,678	28,030	28,198	28,131	27,944	27,812	27,695	27,572	27,481	27,453	27,365
Change from previous year		524	242	261	561	512	356	163	106	-90	70	352	168	-67	-187	-131	-118	-123	-90	-29	-87
Pensionable-age population	18,854	18,714	18,561	18,281	18,106	18,228	18,432	18,583	18,709	18,840	18,818	18,570	18,434	18,544	18,725	18,889	19,062	19,275	19,405	19,470	19,596
Change from previous year		-141	-152	-280	-175	122	204	151	126	130	-22	-248	-136	110	182	164	173	213	129	65	126

PROJECTION 2 – Totton & the Waterside

Components of change

	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36
Births	719	699	670	653	639	620	604	584	570	565	562	562	558	559	564	568	573	574	580	584
Deaths	587	587	590	596	601	606	614	621	631	644	654	669	679	696	712	725	743	756	775	790
Natural change	133	112	79	58	37	14	-10	-37	-60	-79	-92	-108	-121	-137	-148	-157	-170	-182	-195	-206
In-migration	3,180	3,113	3,289	3,427	3,412	3,490	3,498	3,654	3,816	3,890	3,902	3,808	3,818	3,875	3,843	3,778	3,724	3,746	3,756	3,751
Out-migration	3,498	3,575	3,429	3,324	3,342	3,288	3,295	3,181	3,068	3,034	3,053	3,158	3,177	3,164	3,222	3,300	3,364	3,373	3,395	3,430
Net migration	-318	-462	-140	103	70	202	203	474	748	856	849	650	641	711	621	479	360	373	361	321

Population (broad age groups)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
Age 0-14	11,711	11,818	11,838	11,902	11,961	11,910	11,919	11,815	11,769	11,697	11,631	11,510	11,401	11,298	11,213	11,106	10,986	10,860	10,753	10,662	10,580
Age 15-29	10,676	10,105	9,512	9,110	8,883	8,715	8,596	8,623	8,652	8,838	9,094	9,485	9,773	10,019	10,249	10,442	10,616	10,678	10,737	10,751	10,634
Age 30-44	11,714	11,570	11,452	11,421	11,328	11,318	11,303	11,196	11,141	11,116	11,074	10,921	10,713	10,537	10,395	10,267	10,018	9,808	9,649	9,543	9,511
Age 45-59	14,867	14,899	14,780	14,613	14,569	14,396	14,141	13,904	13,745	13,652	13,608	13,632	13,630	13,587	13,637	13,551	13,558	13,593	13,672	13,666	13,741
Age 60-74	12,238	12,470	12,741	12,967	13,151	13,398	13,480	13,734	14,054	14,416	14,775	15,057	15,295	15,562	15,804	16,101	16,283	16,311	16,263	16,282	16,181
Age 75+	7,027	7,185	7,375	7,626	7,910	8,174	8,690	9,052	9,402	9,734	10,049	10,384	10,719	11,050	11,331	11,635	11,965	12,369	12,738	13,077	13,450
Total population	68,232	68,047	67,698	67,639	67,802	67,912	68,129	68,324	68,763	69,452	70,230	70,988	71,531	72,053	72,629	73,103	73,427	73,619	73,812	73,980	74,097
Change from previous year		-185	-349	-59	163	110	218	195	438	689	778	758	543	522	576	475	323	193	193	168	117
Households	29,226	29,314	29,339	29,464	29,653	29,820	30,011	30,203	30,501	30,896	31,343	31,758	32,121	32,480	32,864	33,231	33,516	33,780	34,017	34,252	34,481
Change from previous year		88	25	125	189	167	191	192	298	395	447	415	363	359	383	367	285	265	236	236	228
Dwelling need		90	25	127	192	170	195	195	303	402	455	423	370	365	390	373	290	270	240	240	232
Working-age population	39,979	39,738	39,318	39,316	39,455	39,283	39,182	38,975	38,971	39,151	39,635	40,434	40,973	41,020	41,077	41,032	40,900	40,701	40,551	40,382	40,143
Change from previous year		-241	-420	-2	140	-172	-101	-207	-4	180	484	799	539	47	57	-44	-133	-199	-150	-170	-239
Pensionable-age population	15,798	15,808	15,814	15,720	15,657	15,902	16,271	16,680	17,204	17,729	18,084	18,112	18,270	18,860	19,470	20,084	20,666	21,193	21,659	22,099	22,548
Change from previous year		10	6	-94	-62	245	368	410	523	525	355	29	157	590	611	614	582	527	466	440	448