

## Introduction

This report has been produced based on the latest [population projections](#) produced by Statistics Jersey. Projections for the total number and type of households are provided year by year up to 2040. The changes in household structures seen across the 2011 and 2021 census are used to inform these projections.

It is important to note that the projections are not forecasts and so will differ from the actual future outcomes to a greater or lesser extent. They assume that current trends and behaviour in respect of fertility, mortality, migration and household formation continue forward over the projection period. Changes to these assumptions will impact the results, therefore the findings should be considered **an estimate based on recent trends to inform decision making**.

The report also uses the change in the numbers and types of households to provide an objective assessment of future housing needs over the projection period and includes breakdowns of the projected change in the numbers, type and size of dwellings. This assessment is based around the existing distribution of property type to households as observed in the 2021 census. It is based solely on the projected demographic change and assumes that the distribution of households to property type / size remains the same as was observed at the time of the census.

The projections are presented as a series of scenarios based on a set level of net migration experienced every year over the projection period. These are:

- -100 net migration: where 100 people leave the Island over and above the number that arrive.
- Net nil migration: where the number of people arriving equals the number of people leaving.
- +325 net migration: where 325 arrive on the Island over and above the number that leave.
- +700 net migration: where 700 arrive on the Island over and above the number that leave.
- +1,000 net migration: where 1,000 arrive on the Island over and above the number that leave.

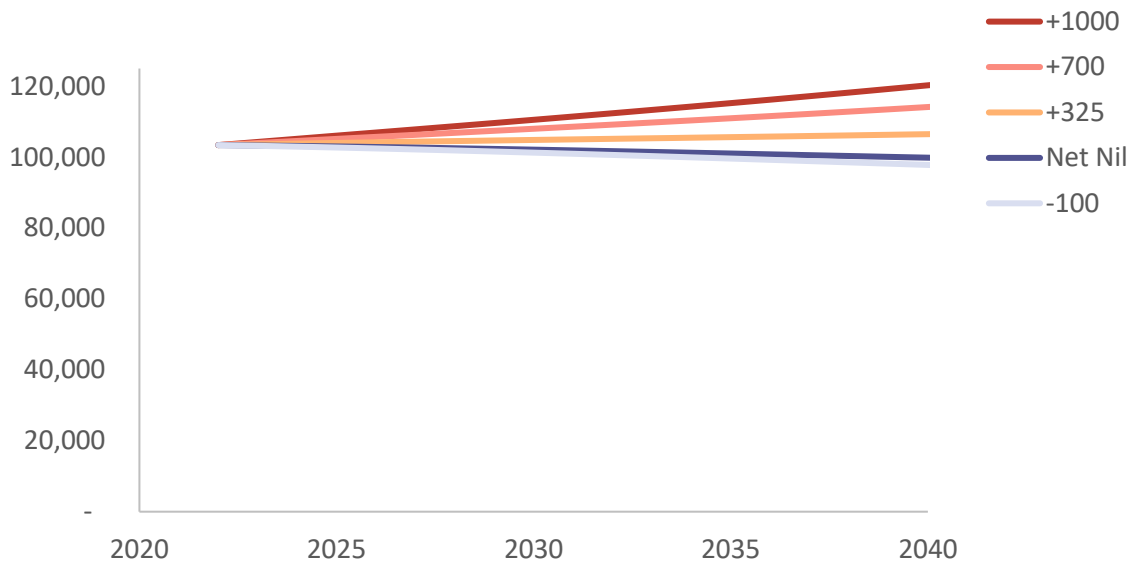
The report provides detailed data tables for each of these scenarios with the report being split as follows:

- [Household projections](#) – page 3
- [Housing needs projections](#) – page 9

## Introduction

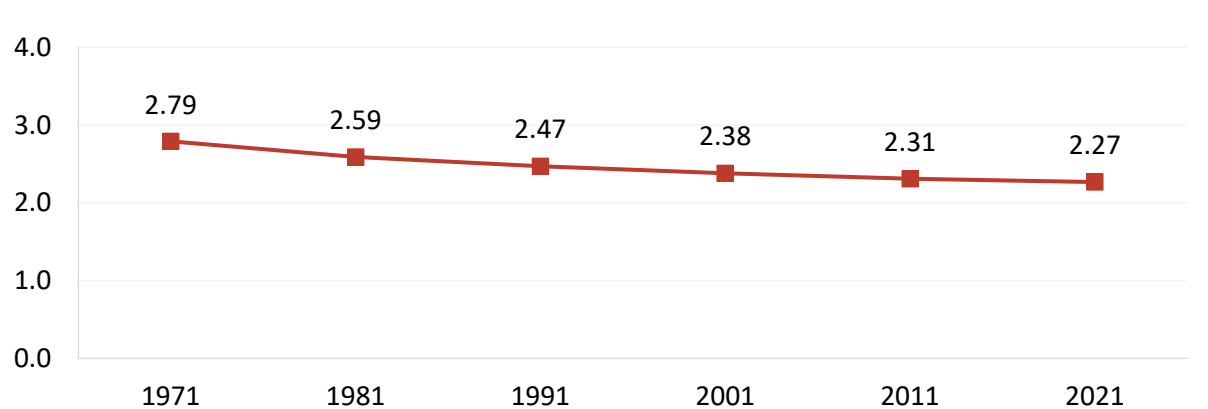
The recently published [population projections](#) showed that the overall population size of Jersey will be heavily influenced by the level of net migration experienced over the projection period. Figure 1 shows the anticipated total population under the different scenarios:

*Figure 1 Overall population size over time under different net migration scenarios*



When considering household projections and the associated need for housing, the starting point is these population projections, however changes to household composition over time also need to be taken into account. As seen from previous census data the ratio of the number of persons per household has been declining over the last five decades:

*Figure 2 Number of persons per household, 1971 to 2021*



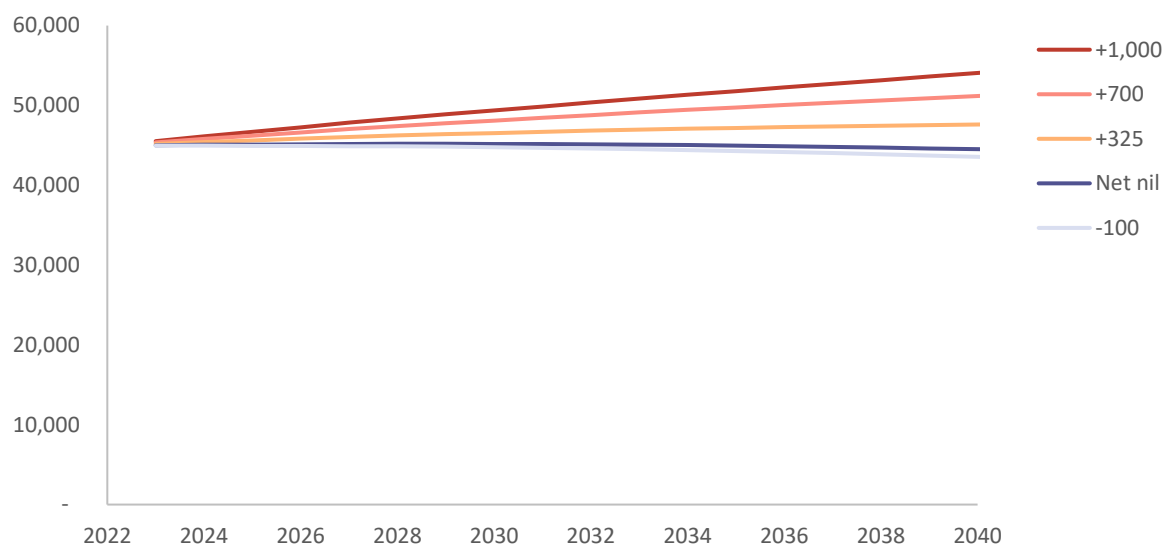
These household projections therefore also project forward the observed changes in household composition that has been observed between the 2011 and 2021 census in order to provide a better estimate of the future number of households under these scenarios. See the [methodology section](#) for further details.

## Household projections

The following pages provide detailed results of each of the 5 migration scenarios covered in this report.

For each scenario a detailed data table is provided detailing the projected number of the different household types at 1-year intervals. The total number of projected households is summarised in the table and figure below:

*Figure 3 Number of households over time under different net migration scenarios*



*Table 1 Total projected households under different net migration scenarios*

Migration scenario	2025	2030	2035	2040
+1,000	46,680	49,370	51,780	54,050
+700	46,210	48,110	49,740	51,190
+325	45,610	46,540	47,190	47,620
Net nil	45,100	45,170	44,980	44,510
-100	44,940	44,760	44,290	43,560

## Net outward 100 migration (-100)

Table 2 Detailed household projection table (-100 net migration)

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040
Projected population	103,200	103,000	102,700	102,500	102,200	101,900	101,600	101,300	101,000	100,600	100,300	100,000	99,600	99,300	98,900	98,500	98,200	97,800
Projected population in private households*	101,000	100,800	100,500	100,200	99,900	99,700	99,300	99,000	98,700	98,300	98,000	97,600	97,300	96,800	96,500	96,100	95,700	95,300
<b>Household type:</b>																		
Single adult	14,140	14,240	14,330	14,420	14,480	14,540	14,590	14,630	14,660	14,690	14,700	14,700	14,700	14,680	14,670	14,640	14,630	14,600
Two adults	14,680	14,720	14,750	14,780	14,780	14,800	14,800	14,780	14,760	14,720	14,670	14,620	14,570	14,500	14,440	14,370	14,300	14,230
One adult & one child	890	890	880	870	870	860	860	850	850	850	840	840	840	840	840	840	830	830
Three or more adults & any number of children	7,620	7,590	7,560	7,530	7,510	7,480	7,450	7,410	7,370	7,330	7,300	7,260	7,220	7,180	7,120	7,070	7,010	6,940
One adult & two or more children	500	490	470	460	450	450	440	430	420	420	410	410	400	390	390	390	380	380
Two adults & one or more children	7,120	7,040	6,940	6,870	6,810	6,750	6,700	6,660	6,630	6,610	6,600	6,590	6,570	6,570	6,560	6,580	6,570	6,580
<b>Total private households</b>	<b>44,950</b>	<b>44,970</b>	<b>44,940</b>	<b>44,930</b>	<b>44,900</b>	<b>44,880</b>	<b>44,840</b>	<b>44,760</b>	<b>44,690</b>	<b>44,620</b>	<b>44,530</b>	<b>44,420</b>	<b>44,290</b>	<b>44,160</b>	<b>44,020</b>	<b>43,880</b>	<b>43,720</b>	<b>43,560</b>

Numbers have been rounded to the nearest 10

\* The remaining population is projected to reside in communal establishments.

## Net nil migration (net nil)

Table 3 Detailed household projection table (net nil migration)

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040
Projected population	103,300	103,200	103,000	102,900	102,700	102,500	102,300	102,100	101,900	101,700	101,500	101,300	101,000	100,800	100,600	100,300	100,100	99,900
Projected population in private households*	101,100	101,000	100,800	100,600	100,400	100,300	100,100	99,800	99,600	99,400	99,200	98,900	98,600	98,400	98,200	97,800	97,600	97,300
<b>Household type:</b>																		
Single adult	14,160	14,280	14,390	14,500	14,580	14,660	14,730	14,790	14,840	14,880	14,910	14,930	14,940	14,940	14,950	14,940	14,940	14,940
Two adults	14,700	14,750	14,800	14,840	14,850	14,890	14,900	14,890	14,880	14,860	14,820	14,780	14,740	14,690	14,640	14,580	14,520	14,460
One adult & one child	890	890	880	880	870	870	860	860	860	860	860	860	860	860	860	860	860	860
Three or more adults & any number of children	7,620	7,610	7,580	7,560	7,540	7,520	7,490	7,460	7,430	7,400	7,370	7,340	7,300	7,270	7,220	7,180	7,130	7,070
One adult & two or more children	500	490	480	460	460	450	440	430	430	420	420	410	410	400	400	400	390	390
Two adults & one or more children	7,130	7,060	6,970	6,910	6,860	6,810	6,770	6,740	6,730	6,720	6,720	6,730	6,720	6,730	6,740	6,770	6,770	6,800
<b>Total private households</b>	<b>45,000</b>	<b>45,070</b>	<b>45,100</b>	<b>45,140</b>	<b>45,160</b>	<b>45,200</b>	<b>45,200</b>	<b>45,170</b>	<b>45,170</b>	<b>45,140</b>	<b>45,100</b>	<b>45,050</b>	<b>44,980</b>	<b>44,900</b>	<b>44,810</b>	<b>44,720</b>	<b>44,610</b>	<b>44,510</b>

Numbers have been rounded to the nearest 10

\* The remaining population is projected to reside in communal establishments.

## Net inward 325 migration (+325)

Table 4 Detailed household projection table (+325 net migration)

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040
Projected population	103,600	103,800	104,000	104,200	104,400	104,500	104,700	104,900	105,000	105,200	105,300	105,500	105,600	105,800	106,000	106,100	106,300	106,500
Projected population in private households*	101,500	101,700	101,800	101,900	102,100	102,300	102,400	102,600	102,700	102,800	103,000	103,200	103,200	103,400	103,500	103,700	103,800	104,000
<b>Household type:</b>																		
Single adult	14,220	14,410	14,600	14,780	14,930	15,070	15,200	15,310	15,410	15,510	15,600	15,670	15,740	15,800	15,860	15,910	15,970	16,020
Two adults	14,750	14,850	14,940	15,030	15,090	15,170	15,220	15,250	15,280	15,300	15,300	15,300	15,300	15,300	15,280	15,260	15,250	15,230
One adult & one child	900	900	890	890	890	890	890	890	890	900	900	910	910	920	920	930	930	940
Three or more adults & any number of children	7,640	7,640	7,640	7,630	7,630	7,630	7,630	7,620	7,610	7,600	7,600	7,590	7,580	7,580	7,560	7,540	7,510	7,480
One adult & two or more children	500	490	480	470	460	460	450	450	450	440	440	440	440	430	430	430	430	430
Two adults & one or more children	7,160	7,120	7,070	7,030	7,020	7,010	7,010	7,020	7,050	7,080	7,120	7,170	7,210	7,260	7,320	7,400	7,440	7,510
<b>Total private households</b>	<b>45,170</b>	<b>45,410</b>	<b>45,610</b>	<b>45,830</b>	<b>46,030</b>	<b>46,230</b>	<b>46,400</b>	<b>46,540</b>	<b>46,700</b>	<b>46,830</b>	<b>46,970</b>	<b>47,090</b>	<b>47,190</b>	<b>47,290</b>	<b>47,380</b>	<b>47,470</b>	<b>47,540</b>	<b>47,620</b>

Numbers have been rounded to the nearest 10

\* The remaining population is projected to reside in communal establishments.

## Net inward 700 migration (+700)

Table 5 Detailed household projection table (+700 net migration)

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040
Projected population	104,000	104,600	105,200	105,700	106,300	106,900	107,400	108,000	108,600	109,200	109,800	110,400	111,000	111,600	112,200	112,800	113,500	114,100
Projected population in private households*	101,900	102,400	103,000	103,500	104,100	104,600	105,200	105,700	106,300	106,900	107,400	108,000	108,500	109,200	109,700	110,400	111,000	111,600
<b>Household type:</b>																		
Single adult	14,300	14,570	14,830	15,090	15,330	15,540	15,730	15,910	16,080	16,240	16,390	16,530	16,660	16,790	16,910	17,030	17,150	17,270
Two adults	14,800	14,960	15,110	15,250	15,370	15,490	15,590	15,670	15,750	15,810	15,860	15,910	15,950	15,990	16,030	16,060	16,090	16,120
One adult & one child	900	900	900	900	910	910	920	930	930	940	950	970	970	990	1,000	1,010	1,020	1,030
Three or more adults & any number of children	7,660	7,680	7,700	7,720	7,740	7,760	7,790	7,800	7,810	7,840	7,860	7,880	7,900	7,930	7,940	7,950	7,960	7,960
One adult & two or more children	500	490	490	480	470	470	470	470	470	470	470	470	470	470	470	470	470	480
Two adults & one or more children	7,200	7,190	7,180	7,180	7,210	7,240	7,280	7,340	7,410	7,490	7,580	7,690	7,780	7,880	7,990	8,110	8,210	8,330
<b>Total private households</b>	<b>45,370</b>	<b>45,810</b>	<b>46,210</b>	<b>46,620</b>	<b>47,030</b>	<b>47,420</b>	<b>47,780</b>	<b>48,110</b>	<b>48,460</b>	<b>48,790</b>	<b>49,120</b>	<b>49,440</b>	<b>49,740</b>	<b>50,040</b>	<b>50,330</b>	<b>50,630</b>	<b>50,900</b>	<b>51,190</b>

Numbers have been rounded to the nearest 10

\* The remaining population is projected to reside in communal establishments.

## Net inward 1,000 migration (+1,000)

Table 6 Detailed household projection table (+1,000 net migration)

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	
Projected population	104,300	105,200	106,100	107,000	107,800	108,700	109,600	110,500	111,500	112,400	113,300	114,300	115,200	116,200	117,200	118,200	119,200	120,300	
Projected population in private households*	102,100	103,000	103,900	104,800	105,600	106,400	107,400	108,200	109,100	110,100	110,900	111,900	112,900	113,800	114,800	115,700	116,700	117,700	
<b>Household type:</b>																			
Single adult	14,360	14,690	15,020	15,350	15,650	15,910	16,160	16,390	16,610	16,820	17,030	17,220	17,400	17,570	17,750	17,920	18,100	18,270	
Two adults	14,850	15,050	15,250	15,430	15,590	15,750	15,890	16,000	16,120	16,220	16,310	16,390	16,470	16,550	16,620	16,690	16,760	16,830	
One adult & one child	900	910	910	920	930	930	940	950	970	980	1,000	1,010	1,030	1,040	1,060	1,070	1,090	1,110	
Three or more adults & any number of children	7,680	7,720	7,750	7,790	7,820	7,870	7,910	7,950	7,980	8,030	8,070	8,120	8,160	8,210	8,240	8,280	8,320	8,340	
One adult & two or more children	500	500	490	480	480	480	480	480	480	490	490	490	490	500	500	510	510	510	
Two adults & one or more children	7,230	7,250	7,260	7,300	7,360	7,420	7,500	7,590	7,710	7,820	7,960	8,100	8,230	8,370	8,520	8,690	8,830	8,990	
<b>Total private households</b>	<b>45,530</b>	<b>46,120</b>	<b>46,680</b>	<b>47,260</b>	<b>47,830</b>	<b>48,380</b>	<b>48,890</b>	<b>49,370</b>	<b>49,870</b>	<b>50,360</b>	<b>50,850</b>	<b>51,320</b>	<b>51,780</b>	<b>52,240</b>	<b>52,700</b>	<b>53,160</b>	<b>53,610</b>	<b>54,050</b>	

Numbers have been rounded to the nearest 10

\* The remaining population is projected to reside in communal establishments.



## Housing needs projections

The housing needs projections build upon the above household projections and assumes that each projected household will require a unit of accommodation. Additional information from the 2021 Census is used to estimate the relationship between household types and the accommodation required. See the [methodology section](#) for more details.

This assessment is based around the existing distribution of property type to households as observed in the 2021 census. It is based solely on the projected demographic change and assumes that the distribution of households to property type / size remains the same as was observed at the time of the census.

For each scenario a detailed data table is provided that provides the projected housing needs for different accommodation types. The difference in the projected number of each housing type compared to the starting point at the beginning of the projections gives the final assessment of housing need.

The total number of projected units required for both qualified and registered accommodation are summarised in the tables below.

*Table 7 Total additional projected qualified / entitled units required under different net migration scenarios*

Migration scenario	2025	2030	2035	2040	Average additional units required per year
+1,000	220	1,440	3,100	4,730	280
+700	160	1,050	2,170	3,190	190
+325	80	570	1,010	1,250	70
Net nil	10	150	0	-420	-20
-100	-10	20	-320	-940	-60

*Table 8 Total projected registered units required under different net migration scenarios*

Migration scenario	2025	2030	2035	2040	Average additional units required per year
+1,000	940	2,400	3,150	3,790	220
+700	680	1,690	2,200	2,640	160
+325	360	800	1,010	1,190	70
Net nil	80	20	-20	-70	0
-100	0	-210	-340	-450	-30

## Net outward 100 migration (-100)

Table 9 Detailed housing needs projection table (-100 net migration)

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040
Projected households	44,950	44,970	44,940	44,930	44,900	44,880	44,840	44,760	44,690	44,620	44,530	44,420	44,290	44,160	44,020	43,880	43,720	43,560
<b>Change in households</b>	<b>0</b>	<b>10</b>	<b>-10</b>	<b>-30</b>	<b>-60</b>	<b>-70</b>	<b>-120</b>	<b>-200</b>	<b>-260</b>	<b>-340</b>	<b>-430</b>	<b>-530</b>	<b>-660</b>	<b>-790</b>	<b>-930</b>	<b>-1,070</b>	<b>-1,240</b>	<b>-1,390</b>
<b>Change in Qualified accommodation since 2023:</b>																		
Flat 1-bed	0	20	40	60	90	120	140	140	150	150	140	130	110	80	50	10	-20	-60
Flat 2-bed	0	-10	-30	-40	-30	-30	-40	-50	-60	-70	-80	-90	-110	-130	-150	-170	-200	-220
Flat 3+ bed	0	0	-10	-10	-10	-10	-10	-10	-20	-20	-20	-20	-20	-30	-30	-30	-30	-40
House 1-bed	0	0	10	10	20	20	20	20	30	30	30	30	30	30	30	20	20	20
House 2-bed	0	10	30	40	50	60	70	70	80	80	80	70	70	60	60	50	40	40
House 3-bed	0	0	-10	-20	0	0	-10	-20	-30	-50	-60	-80	-100	-120	-150	-160	-190	-220
House 4-bed	0	-10	-30	-50	-50	-70	-80	-110	-130	-150	-170	-190	-220	-240	-270	-290	-320	-350
House 5+ bed	0	0	-10	-10	-10	-10	-20	-20	-30	-40	-50	-60	-70	-80	-90	-100	-110	-120
<b>Total</b>	<b>0</b>	<b>20</b>	<b>-10</b>	<b>-20</b>	<b>60</b>	<b>80</b>	<b>70</b>	<b>20</b>	<b>-10</b>	<b>-70</b>	<b>-130</b>	<b>-210</b>	<b>-320</b>	<b>-420</b>	<b>-540</b>	<b>-660</b>	<b>-800</b>	<b>-940</b>
<b>Change in Registered accommodation since 2023:</b>																		
Flat 1-bed	0	0	10	10	-50	-80	-100	-120	-130	-150	-160	-180	-190	-210	-220	-240	-250	-260
Flat 2-bed	0	0	-10	-10	-30	-40	-50	-60	-60	-70	-70	-80	-80	-90	-90	-100	-100	-100
Flat 3+ bed	0	0	0	0	-10	-10	-10	-10	-10	-20	-20	-20	-20	-20	-20	-20	-30	-30
House 1-bed	0	0	0	0	0	0	0	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10
House 2-bed	0	0	0	0	0	-10	-10	-10	-10	-10	-10	-10	-10	-10	-20	-20	-20	-20
House 3-bed	0	0	0	0	-10	-10	-10	-10	-10	-10	-10	-10	-20	-20	-20	-20	-20	-20
House 4-bed	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	-10
House 5+ bed	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>-10</b>	<b>-110</b>	<b>-150</b>	<b>-180</b>	<b>-210</b>	<b>-240</b>	<b>-270</b>	<b>-290</b>	<b>-320</b>	<b>-340</b>	<b>-360</b>	<b>-390</b>	<b>-410</b>	<b>-430</b>	<b>-450</b>

Numbers have been rounded to the nearest 10

## Net nil migration (net nil)

Table 10 Detailed housing needs projection table (net nil migration)

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040
Projected households	45,000	45,070	45,100	45,140	45,160	45,200	45,200	45,170	45,170	45,140	45,100	45,050	44,980	44,900	44,810	44,720	44,610	44,510
<b>Change in households</b>	<b>0</b>	<b>70</b>	<b>90</b>	<b>140</b>	<b>160</b>	<b>190</b>	<b>200</b>	<b>170</b>	<b>170</b>	<b>130</b>	<b>100</b>	<b>50</b>	<b>-30</b>	<b>-110</b>	<b>-190</b>	<b>-280</b>	<b>-390</b>	<b>-490</b>
<b>Change in Qualified accommodation since 2023:</b>																		
Flat 1-bed	0	20	40	70	100	130	160	170	180	190	190	180	170	150	130	100	70	40
Flat 2-bed	0	-10	-20	-30	-20	-20	-20	-30	-30	-30	-30	-40	-50	-60	-70	-90	-100	-120
Flat 3+ bed	0	0	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-10	-20	-20	-20	-20
House 1-bed	0	0	10	10	20	20	20	30	30	30	30	30	30	30	30	30	30	30
House 2-bed	0	20	30	40	50	70	80	80	90	90	100	100	90	90	90	90	80	80
House 3-bed	0	0	0	-10	10	20	20	10	10	10	10	0	-10	-20	-30	-40	-60	-70
House 4-bed	0	-10	-30	-40	-50	-60	-70	-90	-100	-120	-140	-150	-170	-190	-210	-230	-250	-270
House 5+ bed	0	0	-10	-10	-10	-10	-10	-20	-20	-30	-40	-40	-50	-60	-70	-70	-80	-90
<b>Total</b>	<b>0</b>	<b>20</b>	<b>10</b>	<b>20</b>	<b>100</b>	<b>150</b>	<b>160</b>	<b>150</b>	<b>150</b>	<b>130</b>	<b>100</b>	<b>60</b>	<b>0</b>	<b>-70</b>	<b>-150</b>	<b>-230</b>	<b>-330</b>	<b>-420</b>
<b>Change in Registered accommodation since 2023:</b>																		
Flat 1-bed	0	30	60	90	60	50	50	40	40	30	30	20	20	10	10	0	0	-10
Flat 2-bed	0	0	10	10	-10	-10	-10	-20	-20	-20	-30	-30	-30	-30	-40	-40	-40	-40
Flat 3+ bed	0	0	0	0	0	0	0	0	0	-10	-10	-10	-10	-10	-10	-10	-10	-10
House 1-bed	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
House 2-bed	0	0	0	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0
House 3-bed	0	0	0	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0
House 4-bed	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
House 5+ bed	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>40</b>	<b>80</b>	<b>120</b>	<b>60</b>	<b>50</b>	<b>30</b>	<b>20</b>	<b>10</b>	<b>0</b>	<b>-10</b>	<b>-10</b>	<b>-20</b>	<b>-30</b>	<b>-40</b>	<b>-50</b>	<b>-60</b>	<b>-70</b>

Numbers have been rounded to the nearest 10

## Net inward 325 migration (+325)

Table 11 Detailed housing needs g projection table (+325 net migration)

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040
Projected households	45,170	45,410	45,610	45,830	46,030	46,230	46,400	46,540	46,700	46,830	46,970	47,090	47,190	47,290	47,380	47,470	47,540	47,620
<b>Change in households</b>	<b>0</b>	<b>240</b>	<b>440</b>	<b>650</b>	<b>860</b>	<b>1,060</b>	<b>1,230</b>	<b>1,360</b>	<b>1,520</b>	<b>1,660</b>	<b>1,790</b>	<b>1,910</b>	<b>2,010</b>	<b>2,110</b>	<b>2,200</b>	<b>2,290</b>	<b>2,360</b>	<b>2,440</b>
<b>Change in Qualified accommodation since 2023:</b>																		
Flat 1-bed	0	30	60	90	130	180	220	260	290	320	340	360	370	380	380	380	370	370
Flat 2-bed	0	0	-10	-10	0	20	40	50	80	100	110	130	140	160	170	180	190	200
Flat 3+ bed	0	0	0	0	0	0	0	0	10	10	10	20	20	20	20	30	30	30
House 1-bed	0	10	10	10	20	20	30	30	40	40	40	40	50	50	50	50	50	60
House 2-bed	0	20	30	50	70	90	100	120	130	150	160	170	180	190	200	210	210	220
House 3-bed	0	10	10	20	50	80	110	130	160	190	220	250	280	310	330	370	390	420
House 4-bed	0	-10	-20	-30	-30	-30	-30	-30	-30	-30	-30	-30	-30	-30	-30	-30	-40	-40
House 5+ bed	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	-10
<b>Total</b>	<b>0</b>	<b>60</b>	<b>80</b>	<b>120</b>	<b>240</b>	<b>370</b>	<b>480</b>	<b>570</b>	<b>680</b>	<b>770</b>	<b>860</b>	<b>940</b>	<b>1,010</b>	<b>1,070</b>	<b>1,120</b>	<b>1,170</b>	<b>1,210</b>	<b>1,250</b>
<b>Change in Registered accommodation since 2023:</b>																		
Flat 1-bed	0	120	240	360	420	470	510	550	590	620	650	680	700	730	760	780	810	830
Flat 2-bed	0	30	50	80	80	90	100	110	110	120	120	130	130	130	140	140	150	150
Flat 3+ bed	0	10	10	20	20	20	30	30	30	30	30	30	30	30	30	30	40	40
House 1-bed	0	0	10	10	20	20	20	20	20	30	30	30	30	30	30	30	30	30
House 2-bed	0	10	10	20	30	30	30	30	40	40	40	40	40	40	50	50	50	50
House 3-bed	0	10	20	30	30	30	40	40	40	40	50	50	50	50	60	60	60	60
House 4-bed	0	0	10	10	10	10	10	10	10	10	20	20	20	20	20	20	20	20
House 5+ bed	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>180</b>	<b>360</b>	<b>540</b>	<b>610</b>	<b>680</b>	<b>740</b>	<b>800</b>	<b>840</b>	<b>890</b>	<b>930</b>	<b>970</b>	<b>1,010</b>	<b>1,050</b>	<b>1,080</b>	<b>1,120</b>	<b>1,150</b>	<b>1,190</b>

Numbers have been rounded to the nearest 10

## Net inward 700 migration (+700)

Table 12 Detailed housing needs projection table (+700 net migration)

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040
Projected households	45,370	45,810	46,210	46,620	47,030	47,420	47,780	48,110	48,460	48,790	49,120	49,440	49,740	50,040	50,330	50,630	50,900	51,190
<b>Change in households</b>	<b>0</b>	<b>440</b>	<b>840</b>	<b>1,260</b>	<b>1,660</b>	<b>2,050</b>	<b>2,410</b>	<b>2,740</b>	<b>3,090</b>	<b>3,420</b>	<b>3,750</b>	<b>4,070</b>	<b>4,370</b>	<b>4,670</b>	<b>4,970</b>	<b>5,260</b>	<b>5,540</b>	<b>5,820</b>
<b>Change in Qualified accommodation since 2023:</b>																		
Flat 1-bed	0	40	70	110	160	230	300	350	420	470	520	560	600	640	670	690	720	750
Flat 2-bed	0	0	0	10	30	70	110	150	200	240	280	330	370	410	450	500	530	570
Flat 3+ bed	0	0	0	0	0	10	10	20	30	30	40	50	50	60	70	80	80	90
House 1-bed	0	10	10	20	20	30	30	40	50	50	60	60	60	70	70	80	80	90
House 2-bed	0	20	40	60	80	110	130	160	180	210	230	250	280	300	320	340	360	390
House 3-bed	0	30	40	60	100	160	210	270	340	400	470	540	610	680	760	840	900	980
House 4-bed	0	0	-10	-10	0	10	30	40	50	70	90	110	130	150	170	190	210	230
House 5+ bed	0	0	0	0	10	20	20	30	30	40	50	60	60	70	70	80	90	90
<b>Total</b>	<b>0</b>	<b>100</b>	<b>160</b>	<b>240</b>	<b>410</b>	<b>630</b>	<b>850</b>	<b>1,050</b>	<b>1,290</b>	<b>1,510</b>	<b>1,740</b>	<b>1,970</b>	<b>2,170</b>	<b>2,380</b>	<b>2,590</b>	<b>2,790</b>	<b>2,980</b>	<b>3,190</b>
<b>Change in Registered accommodation since 2023:</b>																		
Flat 1-bed	0	230	460	680	850	960	1,050	1,140	1,220	1,290	1,360	1,430	1,500	1,560	1,620	1,680	1,740	1,790
Flat 2-bed	0	50	100	150	190	210	230	250	260	280	290	300	320	330	340	350	360	370
Flat 3+ bed	0	10	30	40	50	50	60	60	70	70	70	80	80	80	80	90	90	90
House 1-bed	0	10	20	30	30	40	40	50	50	50	60	60	60	60	70	70	70	70
House 2-bed	0	10	30	40	50	60	70	70	80	80	90	90	90	100	100	110	110	110
House 3-bed	0	20	30	50	60	70	80	80	90	90	100	100	110	110	120	120	130	130
House 4-bed	0	10	10	20	20	20	20	30	30	30	30	30	40	40	40	40	40	40
House 5+ bed	0	0	0	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
<b>Total</b>	<b>0</b>	<b>340</b>	<b>680</b>	<b>1,020</b>	<b>1,250</b>	<b>1,420</b>	<b>1,560</b>	<b>1,690</b>	<b>1,800</b>	<b>1,910</b>	<b>2,010</b>	<b>2,110</b>	<b>2,200</b>	<b>2,290</b>	<b>2,380</b>	<b>2,470</b>	<b>2,550</b>	<b>2,640</b>

Numbers have been rounded to the nearest 10

## Net inward 1,000 migration (+1,000)

Table 13 Detailed housing needs projection table (+1,000 net migration)

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	
Projected households	45,530	46,120	46,680	47,260	47,830	48,380	48,890	49,370	49,870	50,360	50,850	51,320	51,780	52,240	52,700	53,160	53,610	54,050	
<b>Change in households</b>	<b>0</b>	<b>590</b>	<b>1,150</b>	<b>1,740</b>	<b>2,310</b>	<b>2,850</b>	<b>3,360</b>	<b>3,840</b>	<b>4,350</b>	<b>4,830</b>	<b>5,320</b>	<b>5,800</b>	<b>6,260</b>	<b>6,720</b>	<b>7,170</b>	<b>7,630</b>	<b>8,080</b>	<b>8,530</b>	
<b>Change in Qualified accommodation since 2023:</b>																			
Flat 1-bed	0	40	90	130	190	280	360	430	510	590	660	730	790	850	900	950	1,000	1,050	
Flat 2-bed	0	10	20	30	60	110	170	230	290	360	420	490	550	620	680	740	800	870	
Flat 3+ bed	0	0	0	0	10	10	20	30	40	50	60	70	80	90	110	120	130	140	
House 1-bed	0	10	10	20	20	30	40	40	50	60	70	70	80	80	90	100	100	110	
House 2-bed	0	20	40	70	90	120	160	190	220	260	290	320	350	390	420	450	480	520	
House 3-bed	0	30	50	80	140	220	300	380	470	570	670	780	880	990	1,090	1,210	1,320	1,430	
House 4-bed	0	0	0	0	20	40	70	90	120	150	190	220	260	300	330	380	410	450	
House 5+ bed	0	0	10	10	20	30	40	50	60	70	80	100	110	120	130	150	160	170	
<b>Total</b>	<b>0</b>	<b>120</b>	<b>220</b>	<b>340</b>	<b>540</b>	<b>840</b>	<b>1,150</b>	<b>1,440</b>	<b>1,780</b>	<b>2,100</b>	<b>2,450</b>	<b>2,780</b>	<b>3,100</b>	<b>3,430</b>	<b>3,760</b>	<b>4,090</b>	<b>4,410</b>	<b>4,730</b>	
<b>Change in Registered accommodation since 2023:</b>																			
Flat 1-bed	0	310	630	940	1,180	1,350	1,490	1,610	1,730	1,840	1,940	2,040	2,130	2,220	2,310	2,400	2,480	2,570	
Flat 2-bed	0	70	150	220	270	310	340	360	390	410	430	450	470	480	500	520	540	550	
Flat 3+ bed	0	20	40	50	70	80	80	90	100	100	110	110	120	120	120	130	130	140	
House 1-bed	0	10	30	40	50	60	60	70	70	80	80	80	90	90	90	100	100	110	
House 2-bed	0	20	40	60	70	80	90	100	110	120	120	130	130	140	150	150	160	160	
House 3-bed	0	20	40	70	80	100	110	120	130	130	140	150	160	160	170	180	180	190	
House 4-bed	0	10	10	20	30	30	30	40	40	40	40	50	50	50	50	60	60	60	
House 5+ bed	0	0	0	10	10	10	10	10	10	10	10	10	20	20	20	20	20	20	
<b>Total</b>	<b>0</b>	<b>470</b>	<b>940</b>	<b>1,400</b>	<b>1,770</b>	<b>2,010</b>	<b>2,210</b>	<b>2,400</b>	<b>2,570</b>	<b>2,730</b>	<b>2,880</b>	<b>3,020</b>	<b>3,150</b>	<b>3,290</b>	<b>3,420</b>	<b>3,540</b>	<b>3,670</b>	<b>3,790</b>	

Numbers have been rounded to the nearest 10

## Methodology

### Household projections

Data from censuses in 2011 and 2021 was analysed to identify the proportion of each of six age and two sex groups who were heads of household<sup>1</sup> for each of 6 household types (the ‘headship rate’). These household types were further subdivided into two groups, those living in non-qualified accommodation and those living in qualified accommodation (this includes owner-occupied, social and private rental).

Behaviour in headship rates for the households across the 10 years were projected forwards using the following two-point exponential model:

$$y_i = k + ab^{x_i}$$

where  $i$  = the year, from 2023 to 2040

$y_i$  = headship rate in year  $i$

$k = 1$  if  $y_{2021} \geq y_{2011}$ ;  $0$  if  $y_{2021} < y_{2011}$

$a = y_{2011} - k$

$b = \frac{y_{2021} - k}{y_{2011} - k}$

$x_i = \frac{i - 2011}{2021 - 2011}$

Projected headship (and non-headship) rates were constrained to sum to 1 within each age group.

Age groups used in analysis:

- 0 – 15 years
- 16 – 29 years
- 30 – 44 years
- 45 – 59 years
- 60 – 74 years
- 75+ years

Households in each of the censuses were categorised according to the number of adults (aged 16 years or over) and the number of children (aged 15 years or under) living as a household.

The household projections were then calculated by applying these projected headship rates to the projected population living in private households to give an estimate of the number of heads of household (and thereby number of households) in each of the projection years for each household type, age group and gender.

The projected population living in private households is determined from the full projected population adjusted for the projected number of people living in communal establishments. This is assumed to remain a constant number for the under 75 years, and a constant proportion of the 75 years and over population.

This household projection method assumes that changes in household formation for households seen from 2011 and 2021 will continue, which may not necessarily be the case. However, the methodology provides a more detailed picture of future household numbers by household size than simply projecting the change in average household size and applying this to the population projections.

---

<sup>1</sup> In this case the head of household was identified using the ‘first on form’ method where the person who filled in the census form for the household was categorised as the ‘head of household’.

## Housing needs projections

The housing needs projections build upon the above housing projections and uses additional information from the 2021 Census that identifies the relationship between different accommodation types (size and type) and the characteristics of the same heads of household using in the household projections.

The household / head of household characteristics that are used are summarised below:

*Table 14 Household and head of household characteristics used in housing projections.*

<b>Sex</b>	<b>Age</b>	<b>Household type they live in</b>	<b>Residential Status</b>
Male	16-29	Single adult	Qualified
Female	30-44	Two adults	Registered
	45-59	One adult & one child	
	60-74	Three or more adults	
	75+	One adult & two or more children	
		Two adults & one or more children	

For each unique household type, the proportions that reside in different accommodation types are then obtained from the 2021 Census. The different accommodation types used are summarised below:

*Table 15 Accommodation types used in housing projections.*

<b>Qualified accommodation</b>	<b>Registered accommodation</b>
Flat 1-bed	Flat 1-bed
Flat 2-bed	Flat 2-bed
Flat 3+ bed	Flat 3+ bed
House 1-bed	House 1-bed
House 2-bed	House 2-bed
House 3-bed	House 3-bed
House 4-bed	House 4-bed
House 5+ bed	House 5+ bed

Each projected household is then assumed to require 1 unit of accommodation, and these are proportioned based on these ratios. The difference in the projected number of each housing type compared to the starting point at the beginning of the projections then gives the final assessment of housing need.