Eastleigh Local Economy 2016

A socio-economic overview of the local economy of Eastleigh and its sub-areas

January 2017

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Produced by Economic Business and Intelligence Service (EBIS) at Hampshire County Council on behalf of the Chief Executive Unit at Eastleigh Borough Council

Executive Summary

The economy of Eastleigh is a major contributor to the economic growth of the economy of Solent and the wider economy of Hampshire. In 2014 the economy of Eastleigh produced around £3.5bn of goods and services. Total output (GVA) growth in Eastleigh was similar to Test Valley and Eastleigh was the 5th largest economy in the Solent LEP.

The distribution of economic activity in Eastleigh is not dissimilar to Solent and the rest of Hampshire. Distribution, transport, accommodation and food sector accounts for almost one in five pounds generated in the area. Business services is the second largest sector with 15% of total output. High-productivity manufacturing and information and communication (ICT) sectors are over-represented in Eastleigh relative to the UK and the broad public administration sector is under-represented relative to Solent and the UK average. ICT accounts for one in every £10 generated in Eastleigh and the concentration of economic activity in this sector in Eastleigh is more than 1.5 times the UK or Solent average. Finance & insurance is another sector that is far more important to the economy of Eastleigh than to the economy of Solent.

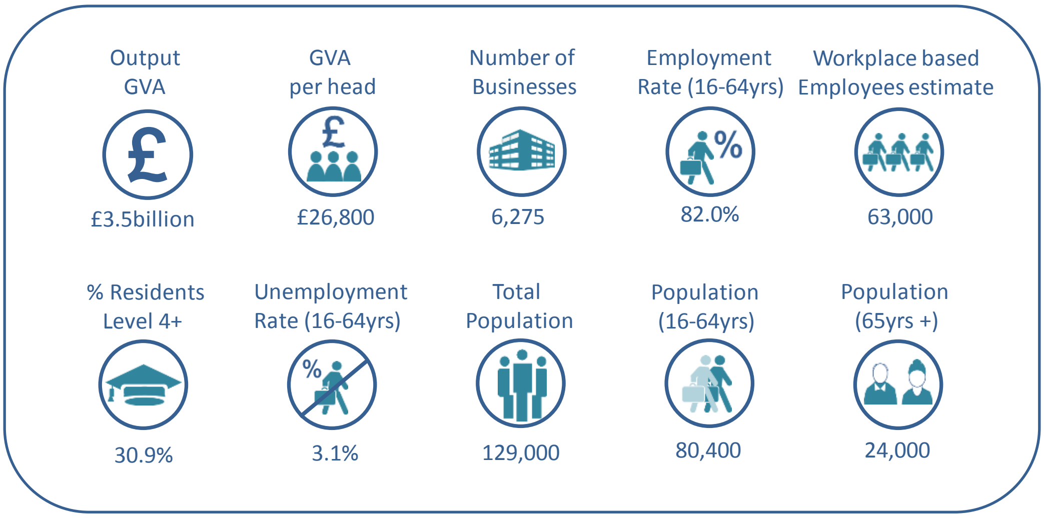
Eastleigh's share of the Solent economy increased from 12.8% in 1997 to 14.4% in 2014 and Eastleigh was more resilient to the impact of the last recession than Solent or the UK economy. A relatively high concentration of several high-productivity private sectors is a major factor that explains the resilience of the economy to economic downturns and rising share of GVA in the economy of Solent LEP.

Nominal economic growth in Eastleigh in 2014 is estimated at 3.8% in 2014, faster than the Solent average (3.5%) but marginally slower than the UK average. Since 2010 GVA growth in Eastleigh on average expanded by 2.8% per annum (p.a.) compared to 5.6% p.a. in the pre-recession decade. A slower growth since the recession is common to most local economies in England. The main cause of the slower growth since 2010 is found in a slower GVA growth in several large sectors namely, business services, distribution & transport and the public sector. Manufacturing growth since 2010 has been on average four times as fast as in the pre-recession decade.

With GVA per head of around £26,800 Eastleigh was the 3rd most prosperous economy in the Solent Area in 2014. The level of economic prosperity in Eastleigh was about 17% above the Solent average and about 9% above the UK average. Since 1997 Eastleigh has become more prosperous relative to the Solent average – GVA per head relative to the Solent average increased from about 8% above the Solent average in 1997 to 17% above the average in 2014.

Labour productivity is the main driver of competitiveness and economic prosperity over the long run. Labour productivity per FTE employee in Eastleigh stood at around £70,300 in 2014, marginally above the national average and about 17.3% above the Solent average. Since 2010 labour productivity in Eastleigh has improved slightly relative to the national average.

Figure E1: Headline socio-economic indicators for the borough of Eastleigh



Source: ONS (2016)

Enterprise is a major driver of productivity and economic prosperity and the latest data for Eastleigh is relatively strong across a number of important sectors. In 2016 there were over 6,200 local business units in Eastleigh or 13.1% of all businesses in the Solent Area. Approximately half of these businesses are situated in the Hedge End, West End and Botley sub-area and Eastleigh sub-area with 1,765 and 1,570 local units respectively. The smallest number of businesses is found in the Bursledon, Hamble-le-Rice and Hound area with around 975 local units.

The distribution of micro, small and medium-sized businesses in Eastleigh is similar to the Solent LEP and the national average. Micro-businesses with nine or fewer employees make up 83.6% of all local businesses, small businesses (10-49 employees) account for 13% and medium businesses (50-249 employees) account for 2.9%. The concentration of large businesses (250+ employees) in Eastleigh (0.6% of the total) is greater than in Solent or the UK as a whole (0.4% respectively).

The total number of businesses in Eastleigh increased by 1,100 since 2010. An increase in the business stock of over 400 businesses occurred between 2015 and 2016 and over 90% since 2013. Business population in Eastleigh has grown faster than in the Solent Area and the UK. Bishopstoke, Fair Oak and Horton Heath sub-area accounted for over 50% of the increase in business stock in Eastleigh in 2016. Business growth in Chandler's Ford and Hiltingbury sub-area and Bursledon, Hamble-le-Rice and Hound sub-area was sluggish in 2016 and since 2010 (around 1.5% per annum).

The distribution, food, transport and accommodation sector accounts for nearly 30% of all firms and is the largest sector in Eastleigh. Moreover business growth in this sector (18% in 2016) was eight times faster than in the Solent LEP and 11 times faster than the UK average. Much of the increase in this broad sector was driven by retail. Output (GVA) growth in Eastleigh since 2010 was held back by the broad distribution, transport and accommodation sector. The strong business growth in this sector suggests that its contribution to the overall GVA growth in Eastleigh is likely to increase in the future.

Information and communication (ICT), one of the strategic sectors in Eastleigh accounts for approximately 8% of all firms in the borough. This sector has seen the fastest growth in business stock since 2010 (almost 5% p.a. or 115 new businesses since 2010). Relatively strong growth in this sector is good news for the competitiveness of the economy and future growth.

Business density per head of adult population in Eastleigh is above the Solent LEP average and the national average. Business births and business deaths are also generally higher than the Solent LEP and the national average.

Business growth in the area has been made possible by a substantial increase in commercial development completions during 2015/16. For instance, the GE Aviation Systems (aero-structures) site totalling 9,512m^2 at Kings Avenue, Hamble has been partially developed. Eastleigh also saw major investment in new research facilities in recent years, including the development of the new B&Q headquarters in Chandler's Ford.

The labour market is another factor that makes the economy successful and prosperous. Eastleigh tends to have a healthy labour market with high participation and employment rates and low unemployment rates. At 82% of working age people in employment Eastleigh has one of the highest employment rates in the country (ranked in the top 20% of local authorities), well above the Solent and national averages. Unemployment in Eastleigh (3.1%) is lower than the Solent LEP and national averages.

There are an estimated 63,000 workplace based employees in Eastleigh. The Eastleigh sub-area has the most employees (26,000) and Bishopstoke, Fair Oak and Horton Heath the fewest (3,500). Furthermore, the largest and smallest sub-area areas accounted for most of the annual growth in workplace employees.

The largest broad sector employer is distribution, transport, accommodation and food, with just under one third of all employees (19,500, or 31.7%). The sector with the highest relative concentration of employees in employment is financial and insurance activities, although its sector share is relatively small at 5.7% (3,500 employees). Employee growth on the year (2014-2015) has been exceptionally strong in information and communications (+20%) and financial and insurance services (+17%). Both sectors grew by an estimated 500 employees each on the year and both sectors are major contributors to GVA growth in Eastleigh.

The financial and professional services sector is the only key sector to see employee growth on the year and since 2010, while retail remained static. In contrast, construction has seen a contraction in annual employee growth and since 2010. Although employment in advanced manufacturing decreased in 2015 employment in this sector is higher than in 2010. Higher employment than in 2010 and relatively strong GVA growth are perhaps signs of manufacturing revival in the area.

Eastleigh Borough as a whole is a small net exporter of workers. Access to the M3 and M27 corridor combined with good rail links helps to facilitate large commuter flows between Eastleigh and the neighbouring area. The main out-commuter destinations are southward to Southampton and to Winchester. In-commuting is dominated by Southampton residents. The Eastleigh sub-area is the primary destination for in-commuters with over 17,000 workers entering the sub-area in 2011, while the Bishopstoke, Fair Oak and Horton Heath sub-area has significantly lower in-commuting.

The unemployment rate on the narrower claimant count measure in Eastleigh has halved from 1.2% in 2013 to 0.6% in 2016. However, Bursledon, Hamble-le-Rice and Hound and Eastleigh sub-areas have rates consistently above the Borough average. Although the Eastleigh sub-area has the highest unemployment rate it has also seen the largest percentage point reduction over the past couple of years.

With just under one third of residents holding a Level 4+ qualification, Eastleigh (30.9%) is below the national (36.9%) and Solent LEP (32.4%) averages on residents with a degree or equivalent qualification. The discrepancy in the distribution of highly skilled population could affect employment and investment in the area over the long-term.

The percentage of Eastleigh year 11 pupils gaining 5 or more GSCEs (A*-C) has been consistently above the Hampshire and England averages between 2013 and 2015. On the new Progress 8 measure, Eastleigh schools have collectively performed above the national average in 2015 and 2016. Eastleigh has ranked third best performing authority in Hampshire over both years.

Eastleigh (2.7%) has one of the lowest NEET rates across Hampshire, and is well below the England average and half that of Portsmouth. At the sub-area Burlesdon, Hamble-le-Rice and Hound sub-area has the highest rate, almost double the Eastleigh average and is the only sub-area above the national average. While the Eastleigh sub-area (4.0%) is marginally below the national NEET, it is above the Eastleigh borough average.

Population is a major driver of economic growth over the long run. The latest data shows that the population of Eastleigh has grown by 0.9% per annum since 2005. This has marginally out-paced the UK (0.8%) and the Solent LEP (0.7%). However, it is the older age group that is driving the overall growth in Eastleigh. The population aged 65 in Eastleigh has on average grown by 2.8% per annum, or three times as fast as the growth in the overall population. In 2015 Eastleigh's elderly population accounted for 18.6% of the total population of the borough.

The growth in the working age population (those aged between 16 and 64) has been sluggish, up 0.5% per annum over the decade. As a share of the total population the working age group accounted for 62.3% in 2015, which is well below the Solent LEP proportion (70.4%). Since 2011 the working age population of Eastleigh has declined marginally. The sluggish growth in the working age population implies that the local economy could become more dependent on the labour inflow from elsewhere in the area which could affect economic growth over the long-run.

Like most local economies in the area the economy of Eastleigh faces a number of potential constraints to future growth, of housing is one of them. Housing affordability in the area is worse than the national average. The median house price in the borough is equivalent to almost nine times the median annual salary (8.7), while the ratio in England stands at 7.6.

The number of housing completions in the area is on the increase but outstanding housing permissions are also on the increase. The number of net housing completions is the highest since 2008/09, but outstanding housing permissions rose by over 4.5 times between 2012 and 2016.

1. Introduction

1.1 The Eastleigh Local Economy Report provides an update on key socio-economic statistics for the borough of Eastleigh. The report is comprised of four themed chapters.

1.2 Following the introduction, the report begins with economic prosperity (Chapter 2) and the general economic health and performance of the economy. This is based on the latest data for the economic prosperity and productivity of Eastleigh using Gross Value Added data to estimate the size of the local economy and productivity. This is followed by the Enterprise chapter that analyses business numbers, size, sectors and growth, and by a brief examination of commercial development sites and floorspace (Chapter 3). The labour market chapter highlights key labour market indicators, workplace employment together with travel to work flows, unemployment, worklessness and skills (Chapter 4). A demographic profile including housing concludes the report (Chapter 5). Additional tables and charts are available in the Appendices.

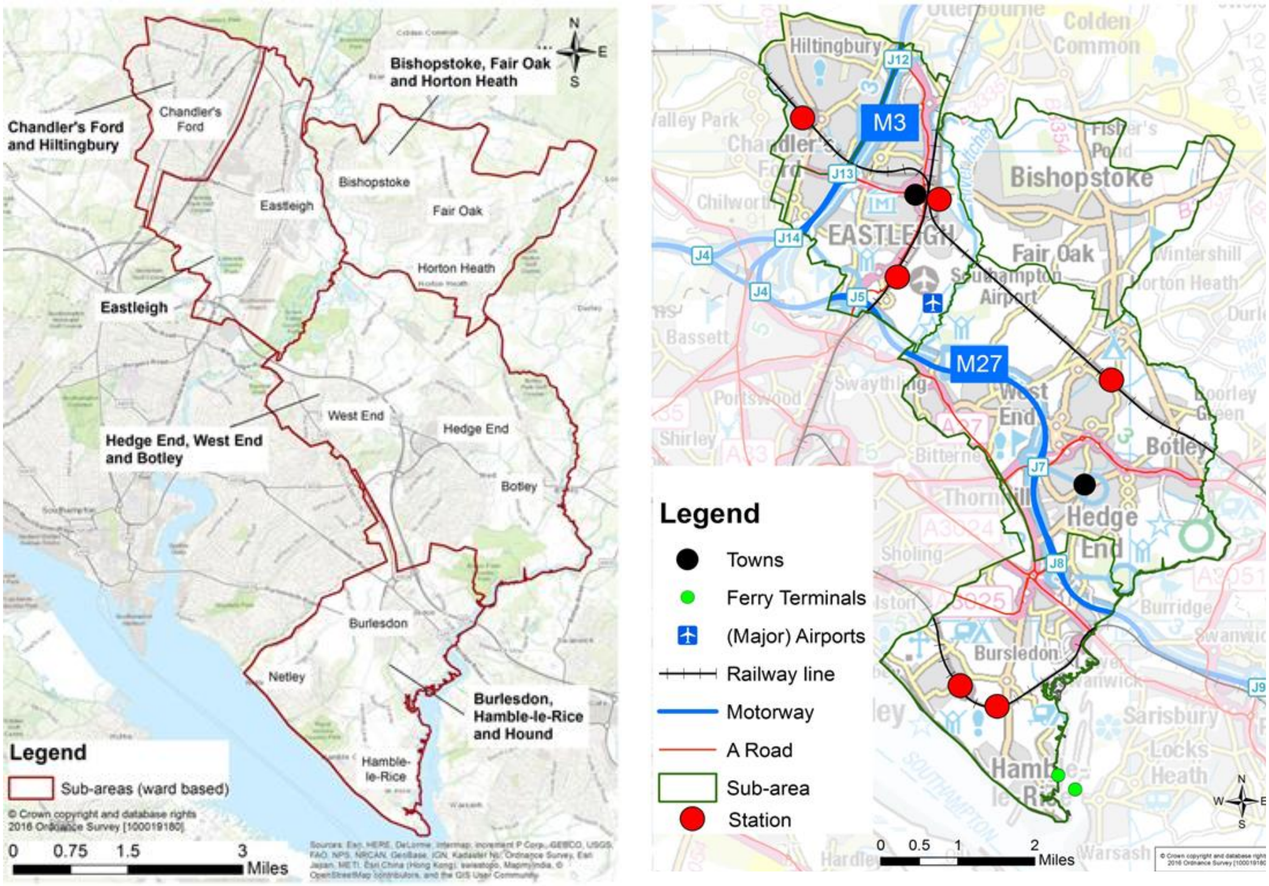
1.3 Where possible the performance of Eastleigh's economy has been compared against the Solent Local Enterprise Partnership (LEP) and the national average i.e. England, Great Britain or the United Kingdom depending on the data.

1.4 In addition to the borough statistics the five Eastleigh sub-areas have been explored where such data is available. Below the local authority level the spatial outputs are determined by the data, and as such several geo-spatial definitions based on the electoral ward or statistical population based Middle Super Output Area (MSOA) have been applied. A description of the definitions can be found in Appendix 1, while the five sub-areas are mapped in Figure 1.1.

1.5 The Eastleigh and Chandler's Ford and Hiltingbury sub-areas are effectively urbanised, while the other three sub-areas are mix of urban and rural areas, with each populated by several towns and villages. With the exception of the Bishopstoke, Fair Oak and Horton Heath sub-area, the other four sub-areas all neighbour Southampton and have direct access to either the M3 or M27 motorways and to rail services. The Burlesdon, Hamble-le-Rice and Hound sub-area is unique in having access to Southampton Water (Figure 1.1).

Figure 1.1: Borough of Eastleigh

Five Sub-Areas | **Key Transport Infrastructure**



Source: Hampshire County Council (2016)

1.6 The Borough of Eastleigh curves round the eastern side of the City of Southampton from Chandler's Ford in the north to the estuary located Hamble-le-Rice in the south. It was home to over 129,000 residents in 2015. The main urban conurbation covers the north of the borough and is comprised of Eastleigh town and Chandler's Ford. These are the main employment and administrative centre in the borough. To the east are the three towns of Bishopstoke, Fair Oak and Horton Heath. The central are is made up of Hedge End and Botley to the east of the M27, and West End which sits adjacent to Southampton (Figure 1.1).

1.7 Eastleigh sits at the southern junction of the M3 and western half of the M27 giving the borough good motorway access, although the area is prone to congestions during peak travel periods. A town with a rich historic link to the railways, Eastleigh is today served by mainline rail services operated by South West Trains to Portsmouth, Southampton, Winchester and London Waterloo. Eastleigh is also home to Southampton Airport with domestic flights to UK destinations (e.g. Manchester, Edinburgh and Belfast) and international flights to western European destinations (e.g. Amsterdam, Paris, Malaga and Dusseldorf). The airport received 148,000 passengers in March 2015[1].

1.8 Eastleigh Borough Council is a local district authority with links to the three upper tier authorities of Hampshire, Portsmouth and Southampton. The Borough is also a member of the Solent Local Enterprise Partnership and Partnership for Urban South Hampshire (PUSH).

[1] Southampton Airport (2015)

2. Economic Prosperity

2.1 This chapter covers the economic output (Gross Value Added) of the local economy of Eastleigh, economic growth and sectoral performance since 2010 and the relative levels of economic prosperity over time. The section concludes by examining labour productivity, the most important driver of competitiveness and economic prosperity over the long run.

2.1 Economic Output

2.2 Gross Value Added (GVA) is used to measure output at regional and sub-regional level in the UK. GVA represents the value of all goods and services produced in an area or industry/sector in a given year.[2] The sub-national GVA estimates measured by the income approach are workplace-based, which implies that output is allocated to the area in which the economic activity takes place.

2.3 The sub-national GVA data that covers all UK regions, Local Enterprise Partnerships (LEPs) and groups of local authority districts and large unitary authorities goes back to 1997. GVA data at district level is not generally available but the Office for National Statistics (ONS) have released experimental estimates of total GVA from 1997 through to 2014 for all local authority districts in England that are consistent with the LEP estimates and the country/regional estimates.[3] Unless otherwise stated the analysis in this section is based on the ONS data.

2.4 Economic growth is expressed in nominal prices and this approach is consistent with the publicly available sub-national data published by the ONS. Given that no adjustment has been made to remove the effects of inflation it is possible for GVA to increase over time, even if the true value of GVA remains unchanged.[4]

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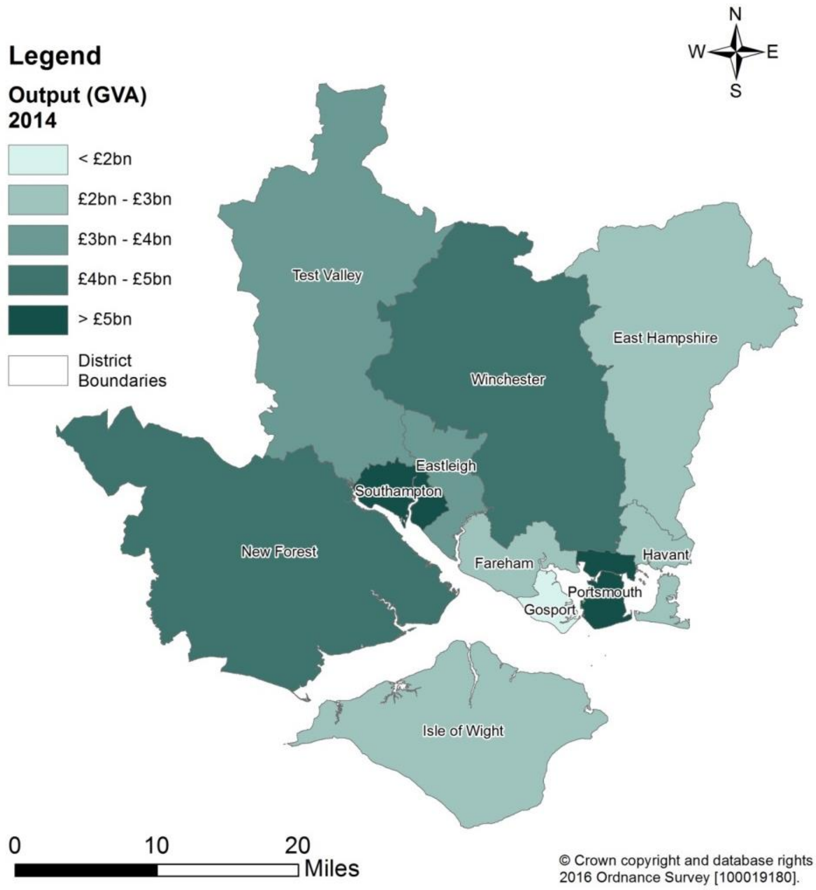
[2] For further information about GVA see Norris, F. (2014) *UK Regional Accounts Methodology Guide*, UK Office for National Statistics, July 2014

[3] ONS (2016) *Regional GVA(I) by Local Authority in England 1997-2014*.
Note: this data is consistent with GVA data published before 15 December 2016. The December 2016 estimate contains preliminary estimates for 2016 at NUTS3 level and some revisions to the historical estimates.

[4] GVA estimates presented in this paper are not directly comparable to the previous estimates expressed in constant prices (adjusted for inflation).

2.5 The economy of Eastleigh produced around £3.5bn worth of goods and services in 2014 according to the most recent ONS estimate. In terms of its size Eastleigh was ranked as the 5th largest economy in the Solent LEP. Total output (GVA) of Eastleigh was similar to Test Valley and larger than the economies of Havant, Fareham, East Hampshire, Isle of Wight and Gosport (Figure 2.1).

Figure 2.1: Total output (GVA) in 2014



Source: ONS (2016)

2.6 The distribution of GVA by broad industrial sector in Eastleigh is not that dissimilar from the economy of Solent and other local economies across Hampshire. The broad distribution, transport, accommodation and food sector accounts for almost 19% of total GVA in Eastleigh (Table 2.1). This is marginally above the UK average but below the Solent average.

2.7 Business services is the second most important industrial sector in the economy of Eastleigh. In 2014 this sector accounted for 15% of total GVA and this sector is more concentrated in Eastleigh than in Solent or the UK economy.[5]

2.8 High productivity manufacturing and information and communication sectors are also over-represented in Eastleigh relative to the UK average. In 2014 manufacturing output accounted for 12.2% of total GVA in Eastleigh which is marginally below the Solent average but above the UK average. Information & communication accounts for about one in every 10 pounds of output generated in Eastleigh and this sector is far more important to the local economy than in the two comparator areas (Table 2.1). The concentration of economic activity in this sector in Eastleigh is more than 1.5 time the UK or the Solent average.

Table 2.1: Sector concentration relative to Solent and UK average, 2014

	Sector share (%)			Concentration relative to	
	Eastleigh	Solent	UK	Solent	UK
Agriculture, forestry and fishing	0.2	0.2	0.7	0.93	0.33
Production other than manufacturing	0.9	2.8	4.3	0.33	0.22
Manufacturing	12.2	12.6	10.8	0.97	1.13
Construction	8.6	6.3	6.3	1.37	1.37
Distribution; transport; accommodation and food	18.8	19.5	18.5	0.97	1.02
Information and communication	9.9	6.5	6.3	1.52	1.56
Financial and insurance activities	8.2	4.8	8.4	1.70	0.98
Real estate activities	10.7	10.8	11.8	0.98	0.90
Business service activities	15.0	11.9	10.1	1.26	1.49
Public administration; education; health	11.9	20.9	18.3	0.57	0.65
Other services and household activities	3.4	3.7	4.4	0.94	0.79
Total	100.0	100.0	100.0	n/a	n/a

Source: ONS 2016. The % share is based on sector total. Sector concentration (100 = Solent/UK average); green denotes above the average concentration of economic activity.

2.9 With 8.2% of total GVA in 2014, finance and insurance is far more important to the economy of Eastleigh than to the economy of Solent. Economic activity in this sector is about 1.7 times more concentrated in Eastleigh than in Solent.

2.10 The broad public administration, education and health sector accounts for about 12% of total GVA in Eastleigh and this sector is underrepresented in Eastleigh relative to the UK average and the Solent average.

[5] See Annex 2 for further information on GVA by broad industrial sector

2.11 Nominal GVA in Eastleigh more than doubled between 1997 and 2014 and over this time the share of Eastleigh in total GVA of the economy of Solent increased from 12.8% in 1997 to 14.4% in 2014.

Table 2.2: GVA growth in Eastleigh relative to Solent and UK average since 2010

	2014 (%)			2010-2014 (% p.a)		
	Eastleigh	Solent	UK	Eastleigh	Solent	UK
Agriculture, forestry and fishing	-11.1	1.6	2.9	12.5	5.7	1.7
Production other than manufacturing	0.0	2.8	-5.6	-6.6	6.1	1.9
Manufacturing	1.4	1.0	2.7	3.4	5.5	4.3
Construction	6.8	7.4	9.2	4.1	4.1	4.5
Distribution; transport; accommodation and food	5.0	7.0	4.8	1.4	4.0	3.4
Information and communication	2.1	-4.2	2.4	7.9	1.6	3.6
Financial and insurance activities	1.1	2.7	7.6	1.7	-0.5	3.3
Real estate activities	4.5	4.9	6.9	7.7	5.9	6.9
Business service activities	9.3	9.3	6.6	3.9	4.3	2.9
Public administration; education; health	1.2	0.2	1.0	-1.4	0.5	0.8
Other services and household activities	-4.0	2.1	6.1	-2.4	-0.4	4.6
Total	**3.8**	**3.5**	**4.1**	**2.8**	**3.1**	**3.4**

Source: Hampshire CC (2016) derived from ONS data.

2.12 Economic activity in nominal terms in Eastleigh expanded by 3.8% in 2014, faster than the Solent average (3.5%) but marginally slower than the UK average (4.1%). Business services were the main driver of growth in 2014, up 9.3% with the broad distribution & transport, construction and real estate activities expanding faster than the Eastleigh average (Table 2.2).

2.13 The preliminary estimate of GVA growth for 2015 points to a slower growth in GVA across much of the country in 2015 compared to the previous year. Economic growth in the UK eased from 5% to 2.9% and growth in the South East eased from 4.5% in 2014 to 3.2% in 2015.

2.14 The preliminary estimates of GVA growth in 2015 for Eastleigh or the LEP are not available but GVA growth in South Hampshire was estimated at 1.4%, marginally slower than growth in 2014 (revised downward from 3.9%).

2.15 Between 2010 and 2014 GVA growth in Eastleigh on average expanded by 2.8%, marginally slower than the Solent average and slower than the UK average (Table 2.2). The Eastleigh average was affected by a contraction in GVA in 2013, down 2.5% compared to the previous year. The fall in GVA was driven by falling output in business services, distribution & transport and the public sector. Hence, if we were to exclude the 2013 from the comparison the relative performance of the economy of Eastleigh was stronger than indicated in Table 2.2.

2.16 Economic growth in Eastleigh has on average been much slower since 2010 than in the pre-recession decade, 2.8% p.a. compared to 5.6% p.a. (Table 2.3), which is consistent with most other sub-regional economies across the country. The main reason behind the slower growth since 2010 is found in a slower GVA growth in several large sectors namely, business services, distribution & transport, information and communication and the public sector.

Table 2.3: GVA growth in Eastleigh over time, % p.a.

	1997-2008	2009	2010	2014	2010-2014
Agriculture, forestry and fishing	2.4	-38.5	-37.5	-11.1	12.5
Production other than manufacturing	7.5	20.0	75.0	0.0	-6.6
Manufacturing	0.8	-4.1	3.9	1.4	3.4
Construction	6.7	-1.6	5.0	6.8	4.1
Distribution; transport; accommodation and food	**5.8**	**-7.2**	**3.4**	**5.0**	**1.4**
Information and communication	**12.2**	**4.0**	**6.8**	**2.1**	**7.9**
Financial and insurance activities	**5.6**	**37.4**	**-11.6**	**1.1**	**1.7**
Real estate activities	7.2	-10.4	17.6	4.5	7.7
Business service activities	**7.8**	**-11.4**	**6.0**	**9.3**	**3.9**
Public administration; education; health	3.8	13.0	4.8	1.2	-1.4
Other services and household activities	8.0	0.0	0.0	-4.0	-2.4
Total	**5.6**	**-0.3**	**4.3**	**3.8**	**2.8**

Source: Hampshire CC (2016) derived from ONS data.

2.17 The economy of Eastleigh was relatively resilient to the impact of the last recession. Nominal GVA in Eastleigh contracted by just 0.3% in 2009, compared to -1.7% in Solent and -1% in the UK. The subsequent recovery was also relatively strong with 4.3% growth in GVA in 2010.

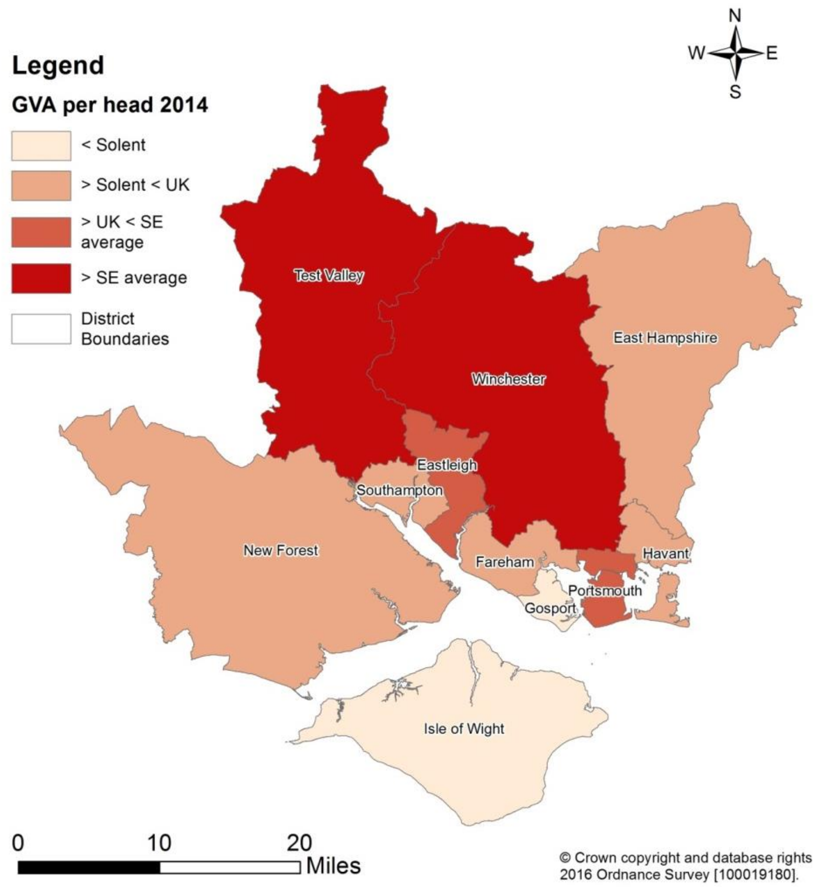
2.18 Manufacturing growth in Eastleigh averaged 3.4% since 2010 compared to 0.8% between 1997 and 2008 (Table 2.3) but GVA growth in this sector lagged the Solent and the UK average.

2.2 Economic prosperity

2.19 Economic prosperity of a sub-regional economy can be measured in different ways but the most widely used indicator of economic prosperity at subnational level is GVA per head. GVA per head is the ratio of total workplace-based output (GVA) to the total resident population.

2.20 With GVA per head of around £37,400 Winchester had the highest levels of economic prosperity in the area in 2014. GVA per head in Eastleigh was around £26,800 and on this measure Eastleigh was the 3rd most prosperous (after Winchester and Test Valley) economy in the Solent Area in 2014.

Figure 2.2: GVA per head in the Solent Area, 2014

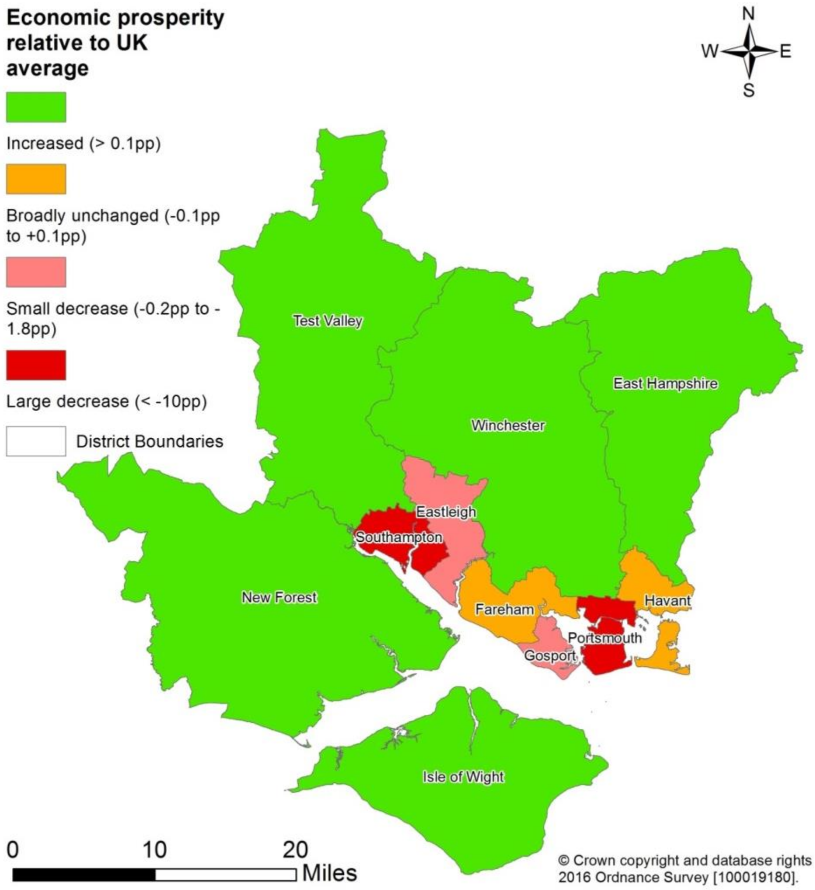


Source: ONS (2016)

2.21 The level of economic prosperity in Eastleigh in 2014 was above the UK average but below the South East average (Figure 2.2). On this measure Eastleigh was about 16.8% more prosperous than the economy of Solent (£22,900 per capita in 2014).

2.22 The level of GVA per head in Eastleigh was about 9% above the UK average in 2014 compared to 10.7% above the average in 1997. This small dip in relative prosperity over time (Figure 2.3) was driven by the relative underperformance of the economy of Eastleigh in 2013. For instance, in 2012 GVA per head in Eastleigh was about 17.4% above the UK average.

Figure 2.3: change in relative economic performance/prosperity, 1997-2014



Source: ONS (2016)

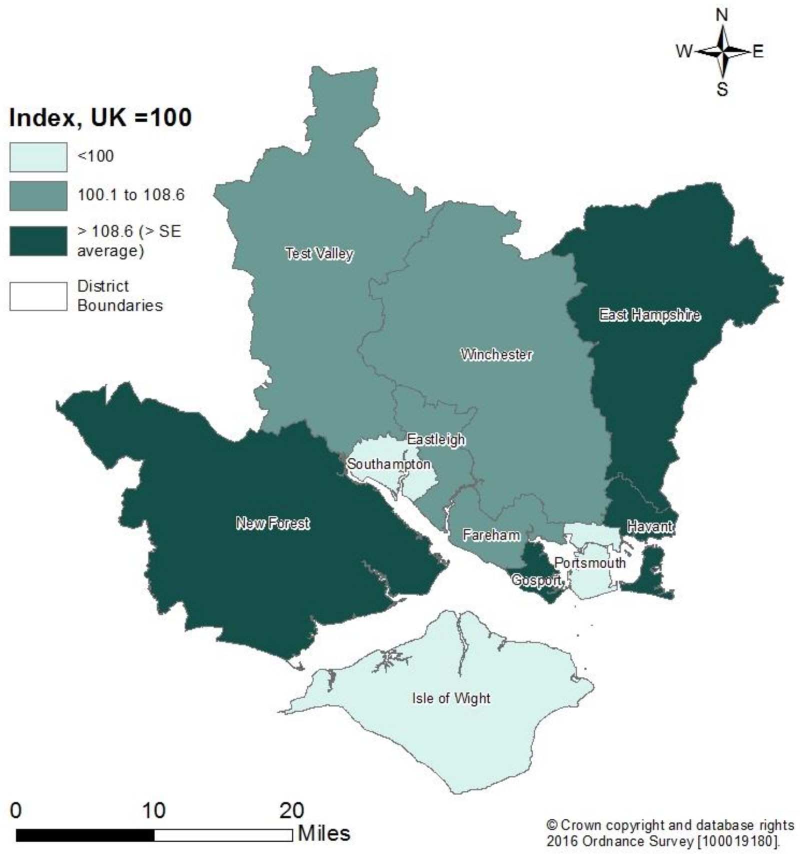
2.23 The levels of economic prosperity in the Solent area relative to the UK average fell from about 2% above the UK average in 1997 to about 7% below the UK average in 2014. Over this time Eastleigh has become more prosperous relative to the Solent average. GVA per head in Eastleigh relative to the Solent average increased from about 8% above the Solent average in 1997 to 17% above the average in 2014.

2.24 Population growth contributed to the relative change in economic prosperity but these differences were mostly driven by the divergence of GVA growth over time. Labour force participation rates and employment rates are major drivers of economic performance and prosperity over the short-to-medium term but labour productivity is the most important driver of competitiveness, GVA growth and economic prosperity over the long-term.

2.3 Labour productivity

2.25 With around £90,000 of economic output (GVA) per full-time equivalent employee Havant had the most productive economy in the area in 2014. Labour productivity in Eastleigh in 2014 stood at around £70,300, marginally above the national (Great Britain average).[6]

Figure 2.4: Labour productivity (per FTE), Index UK=100



Source: HCC derived from ONS (2016)

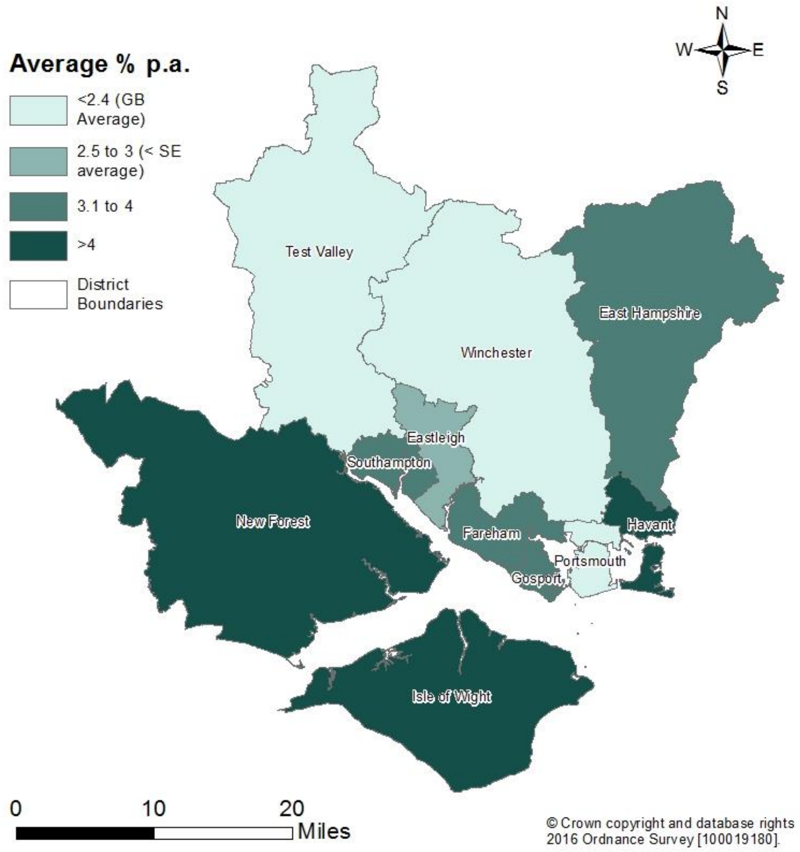
2.26 Labour productivity in Solent (£59,900) stood at about 85.5% of the UK average in 2014. On this measure the economy of Eastleigh was about 17.3%

[6] Full-time equivalent (FTE) employment estimates account for differences in the distribution of local employment between full-time and part-time employees. These productivity estimates exclude self-employment and need to be treated with a degree of caution.

more productive than the Solent average in 2014. Nevertheless, labour productivity in Eastleigh lags the productivity levels in a number of local economies in the area (Figure 2.4).

2.27 Since 2010 labour productivity in Eastleigh has improved slightly relative to the national average, from 98% of the national average in 2010 to 100.3 of the national average in 2014. Compared to the Solent average labour productivity in Eastleigh has remained broadly stable (17.3% above the average in 2014 compared to 17.1% above the average in 2010).

Figure 2.4: Growth in labour productivity, 2010-2014 (average % p.a.)



Source: HCC derived from ONS (2016)

2.28 The improvement relative to the national average was driven by marginally faster growth in labour productivity in Eastleigh (3% on average since 2010) than nationally (2.4% on average in Great Britain. Productivity growth in Eastleigh over this time matched the Solent and the South East average but it lagged several local economies in the area.

2.29 Nevertheless, productivity growth in Eastleigh was faster on average than in neighbouring Test Valley and Winchester (Figure 2.4). Employment growth is another major driver of GVA growth and this is the area where Eastleigh, alongside several other successful neighbouring economies performs better than the rest of Solent.

3. Enterprise

3.1 This chapter explores the number of businesses in Eastleigh and the five Eastleigh sub-areas, the Solent Local Enterprise Partnership (LEP) and the United Kingdom (UK). Furthermore it analyses annual business growth and changes since 2010 and 2015, the type of businesses by size and sector, and their distribution across the five sub-areas. This chapter ends with an analysis of recent commercial developments within the borough.

3.2 The sub-area analysis is based on the Middle Layer Super Output Area (MSOA), the smallest spatial output for business data[7]. Two sub-areas gave a good alignment with the MSOA (Bursledon, Hamble-le-Rice and Hound and Hedge End, West End and Botley), whereas two MSOA covering the remaining sub-areas had an imperfect fit with the electoral wards, but with most of the areas falling within the borough. The small overlaps were mostly residential areas of Hiltingbury East and Chandler's Ford East wards and Bishopstoke West Ward, and as such the two MSOA were allocated to the Eastleigh sub-area.

3.1 Enterprise

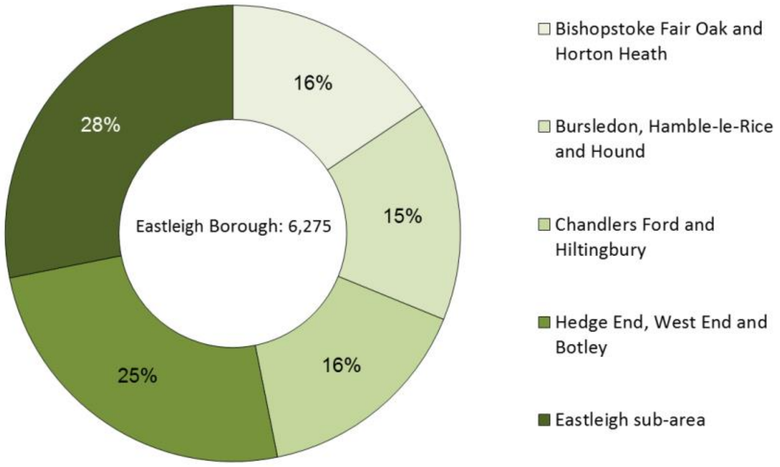
3.3 In 2016 there were more than 6,200 businesses in Eastleigh, with the greatest concentration found in the Eastleigh sub-area with 1,765 local units or 28% of all businesses (Figure 3.1). This is followed closely by one in four businesses located in the Hedge End, West End and Botley sub-area. For the three remaining sub-areas the proportion of businesses is approximately 16%, or between 975 and 985 local units.

3.4 With reference to Figure 3.2 each MSOA[8] has at least 160 businesses. The map shows a business concentration in the town centre area of Eastleigh, while almost all businesses in the Bishopstoke, Fair Oak and Horton Heath sub-area are located to the eastern half in Fair Oak and Horton Heath.

[7] See Appendix 1 for a classification of the five areas of study in the Eastleigh Borough economy.

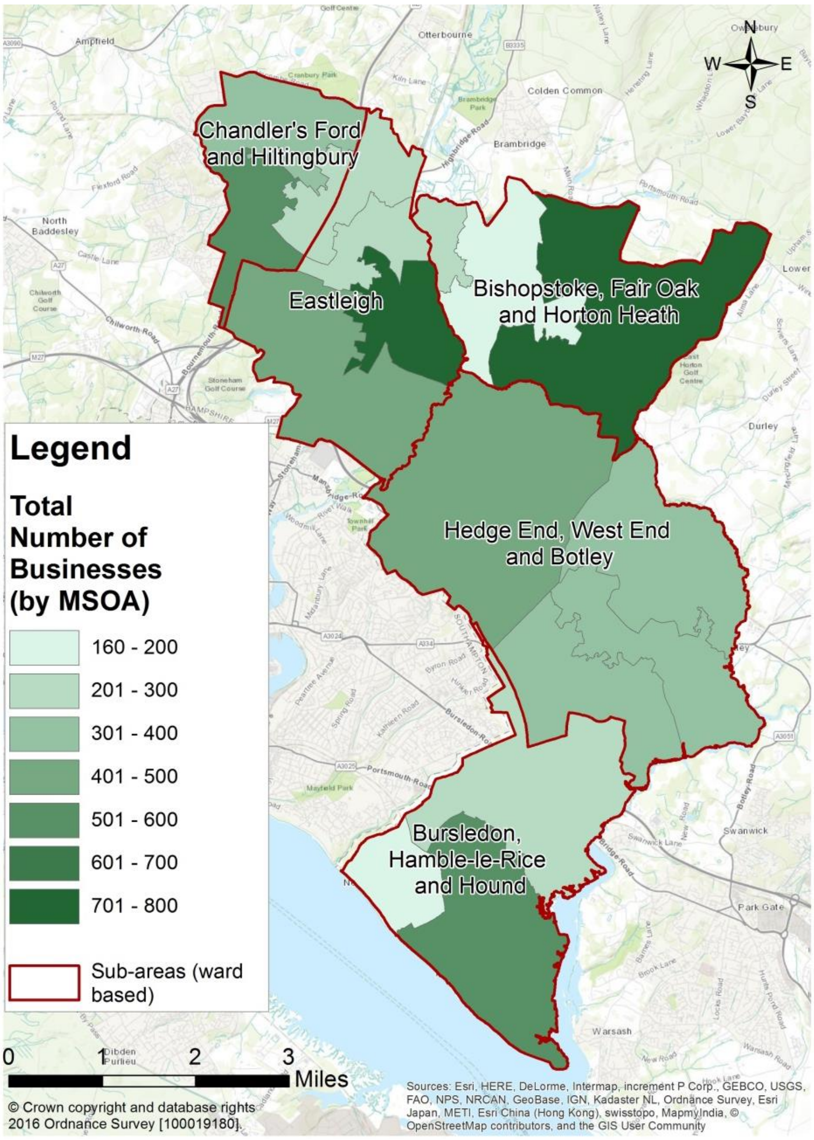
[8] Middle Layer Super Output Area (MSOA), the smallest available spatial output for business data offered by ONS. The minimum population is 5,000 and the mean is 7,200. It has to be borne in mind that the MSOA is a resident population based geography that will not necessarily reflect business concentrations on the ground. For further explanation see Appendix 1.

Figure 3.1: Business Count in Eastleigh and Five Sub-Areas 2016



Source: ONS (2016)

Figure 3.2: Number of Businesses in Eastleigh 2016



Source: ONS (2016)

3.5 Just under half of all businesses in Bishopstoke, Fair Oak and Horton Heath are in the wholesale and retail sector. Similarly, retail is the dominant sector in the Eastleigh sub-area[9]. The professional, scientific and technical sector is the largest business sector (it accounts for one in five businesses) in the Chandlers Ford and Hiltingbury sub-area.

3.6 The greatest even sector distribution of business numbers is located in Bursledon, Hamble-le-Rice and Hound sub-area. Although the Hedge End, West End and Botley sub-area had the second highest number of businesses, the distribution is more even in business number among sectors.

3.7 In the Burlesdon, Hamble-le-Rice and Hound sub-area the concentration of businesses is in Hamble-le-Rice, which for example, is the location of the Ensign Park business estate. In Chandler's Ford and Hiltingbury sub-area the concentration is in the southern MSOA and the location of various industrial and trading estates e.g. the Monks Brook Industrial Park and Chandler's Ford Industrial Estate.

Table 3.2: Businesses by Employment Size-Band 2016

Business Size-band	**Eastleigh**		**Solent LEP**		**United Kingdom**	
	Numbers	%	Numbers	%	Numbers	%
Micro (0 to 9)	5,250	83.6	39,245	82.0	2,530,180	84.1
Small (10 to 49)	815	13.0	7,000	14.6	388,060	12.9
Medium-sized (50 to 249)	180	2.9	1,415	3.0	79,700	2.6
Large (250+)	35	0.6	200	0.4	12,125	0.4
Total	**6,280**	**100.0**	**47,860**	**100.0**	**3,010,065**	**100.0**

Source: ONS (2016). Note: Figures may differ by small amounts from those published in ONS outputs due to the application of a different rounding methodology.

3.8 Table 3.2 shows business size by the number of employees in Eastleigh, the Solent LEP and the UK. This shows broadly similar business size distributions in all areas, but with small variations. The overwhelming majority of all local units are micro-businesses that employee nine or fewer employees.

[9] See Figure 3.1 in Appendix 3.

3.9 In contrast, larger businesses with 250 or more employees make up less than 1% of all companies, but these will have a disproportionate level of importance to the local economy i.e. the closure or inward investment of a large business will have a greater impact on the economy than the loss or creation of numerous smaller enterprises.

3.10 Eastleigh has proportionately more micro-businesses and larger businesses than the Solent LEP, but has proportionately fewer small (10-49 employees) and medium (50-249 employees) sized businesses. Compared to the UK, Eastleigh has fewer micro-businesses, but larger shares for small to large employers.

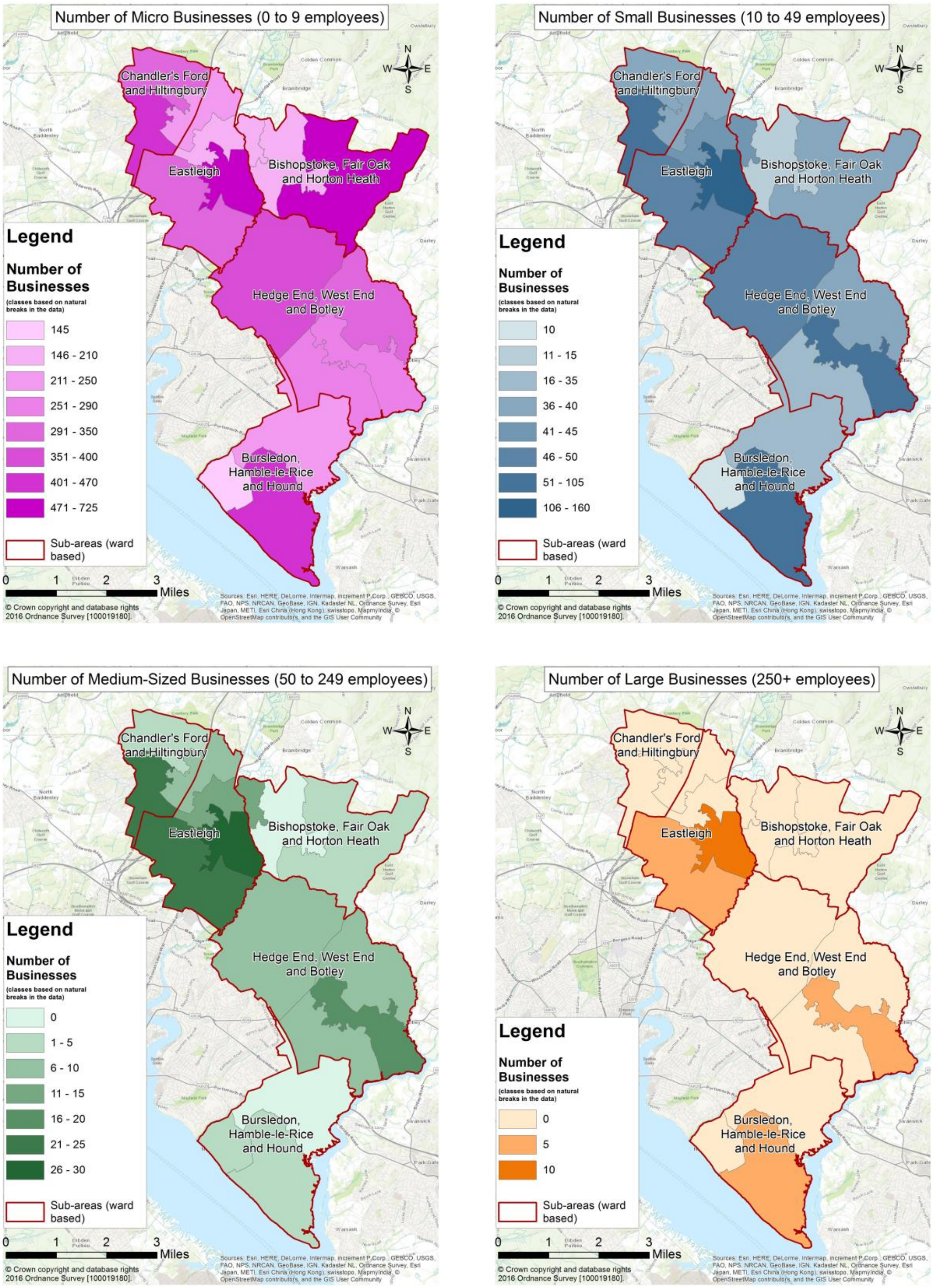
Table 3.3: Businesses Numbers by Employment Size-Band in Eastleigh and Five Sub-Areas 2016

Numbers		Bishopstoke, Fair Oak and Horton Heath	Bursledon, Hamble-le-Rice and Hound	Chandler's Ford and Hiltingbury	Eastleigh sub-area	Hedge End, West End and Botley	Eastleigh (Borough)
Micro (0 to 9)	No.	920	830	810	1,370	1,315	5,245
	%	93.9	85.6	82.2	77.8	83.8	83.7
Small (10 to 49)	No.	55	125	145	295	200	820
	%	5.6	12.9	14.7	16.8	12.7	13.1
Medium-sized (50 to 249)	No.	5	10	30	80	50	175
	%	0.5	1.0	3.0	4.5	3.2	2.8
Large (250+)	No.	0	5	0	15	5	25
	%	0.0	0.5	0.0	0.9	0.3	0.4
Total		**980**	**970**	**985**	**1,760**	**1,570**	**6,265**

Source: ONS (2016). Note: Figures may differ by small amounts from those published in ONS outputs due to the application of a different rounding methodology. Green: above Eastleigh borough average. Pink: below Eastleigh.

3.11 Table 3.3 examines the size and proportion of businesses in the Eastleigh economy and its five sub-areas. The overall distributions match trends in Table 3.2 with micro-businesses dominating the enterprise profiles. However, there is greater variation at the sub-area. The Bishopstoke, Fair Oak and Horton Heath sub-area has the highest proportion of micro businesses (93.9%). This probably reflects fewer industrial or business estates in the area and suitable sites for large developments.

Figure 3.3: Sub-Area Micro, Small, Medium and Large Businesses Spatial Distribution 2016



Source: ONS (2016)

3.12 Chandler's Ford and Hiltingbury and Eastleigh sub-areas have a share of businesses above the borough average for small and medium businesses; which reflects both the town centre retail units and access to several business and industrial estates.

3.13 The Eastleigh sub-area also has by far the highest proportion of large employers which is to be expected given its prominence as the boroughs main commercial centre and location of larger public sector employers. The Hedge End, West End and Botley sub-area has proportionately more micro and medium employers, while Burlesdon, Hamble-le-Rice and Hound has proportionately more micro and large businesses than the borough average.

3.14 Figure 3.3 illustrates the distribution of local units by its employment size. Given the dominance of micro-businesses (pink map), it replicates similarly the spatial distribution in Figure 3.2. The same area concentrations are also evident as the size bands increase and will largely reflect the location of town centres and business and industrial parks, although not precisely as the MSOA is a resident population based geography. As such, the mostly residential areas will show up as lighter shades in each map.

Table 3.4: Business Units by Broad Industrial Sector in the Eastleigh Borough, the Solent LEP and the United Kingdom 2016

	Eastleigh Borough		Solent LEP		United Kingdom	
	No.	%	No.	%	No.	%
Distribution, food, transport and accommodation	1,790	***28.8***	13,585	28.5	795,670	26.4
Business and professional services	1,465	***23.5***	10,805	22.7	726,095	24.1
Construction	905	***14.5***	6,580	13.8	311,375	10.3
Public admin, defence, education and health	485	7.8	4,475	9.4	271,000	9.0
Information and communication	480	***7.7***	3,110	6.5	215,410	7.2
Manufacturing	375	***6.0***	2,670	5.6	144,180	4.8
Other services	365	5.9	3,170	6.7	200,450	6.7
Real estate	165	2.7	1,545	3.2	104,700	3.5
Financial and insurance	145	***2.3***	980	2.1	71,510	2.4
Agriculture, forestry and fishing	50	0.8*	715	1.5	150,870	5.0
Total	6,225	100.0	47,635	100.0	2,991,260	100.0

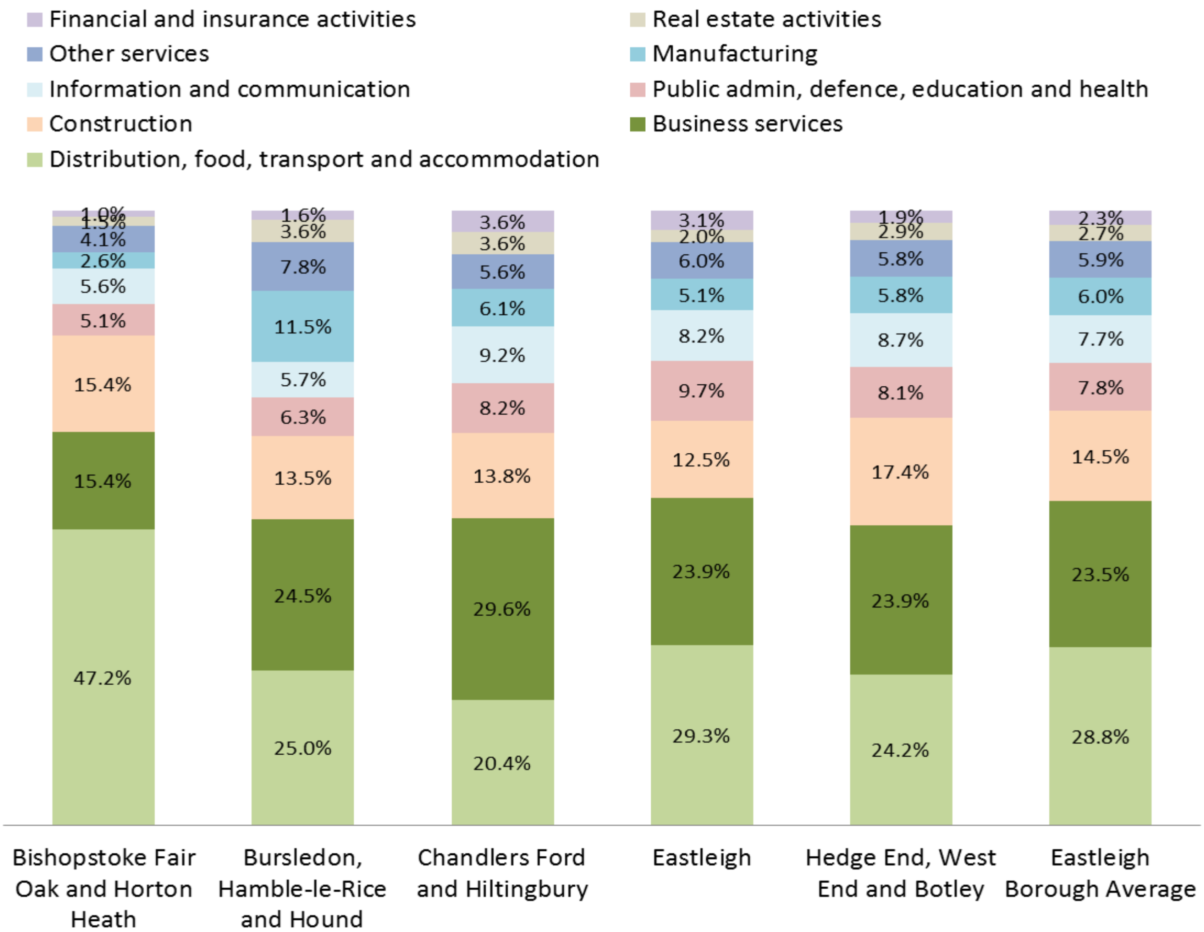
Source: ONS (2016). Note: Green shaded cells denote sector industries with rates above the national average. Bold italic figures denote sector industries rates greater than the Solent LEP rates.*Not directly comparable as sub-regional data excludes farm labourers.

3.15 The sector allocation in Eastleigh is similar to the Solent LEP and the UK, where the primary sectors are distribution, food, transport and accommodation and the business and professional services (Table 3.4). Combined the two sectors account for more than half of all businesses in the borough. In addition, Eastleigh has above the Solent LEP share in business and professional services and financial and insurance sectors.

3.16 Eastleigh has four sectors that have a higher local share than the national and Solent LEP averages:

- Distribution, food, transport and accommodation
- Business and professional services (high value added sector)
- Information and communications (high value added sector)
- Manufacturing (high value added sector)

Figure 3.4: Distribution of Businesses by Broad Sector in Eastleigh and Five Sub-Areas 2016



Source: ONS (2016)

3.17 Figure 3.4 displays the redistribution for the nine[10] broad industries in the five areas of analysis and for the borough as a whole. The same three industry sectors (distribution et al, business services and construction) account for almost two thirds of all businesses. However, there are some variations at sub-area level with almost half of businesses in the Bishopstoke, Fair Oak and Horton Heath sub-area (47.2%) in the distribution, food, transport and accommodation sector, twice the share evident in the Chandler's Ford and Hiltingbury sub area (20.4%).

3.18 In contrast, the Chandler's Ford and Hiltingbury sub-area has a larger percentage share in business and professional services (29.6%). Construction has a larger share in the Hedge End, West End and Botley sub-area (17.4%), while manufacturing is considerably large in the Burlesdon, Hamble-le-Rice and Hound sub-area with a share of 11.5% of businesses which is twice above the borough average for that sector.

3.19 As shown in Table 3.1, the total number of businesses in Eastleigh increased by nearly more than 400 and 1,000 local units since 2015 and since 2010 respectively. Almost 90% of this business augment has occurred since 2013.

3.20 Overall, business stock grew by 7.1% between 2015 and 2016, which was faster than the Solent LEP (3.7%) and United Kingdom (3.5%). Annual business growth by broad sector in Eastleigh has been led by distribution, food, transport and accommodation, with 275 additional businesses accounting for two thirds of all new businesses. The sector grew on the year by 18.2% compared to 2.1% and 1.6% in the Solent LEP and UK respectively.

3.21 The annual growth rate in manufacturing (4.2%) was also higher than the national average. Other strong performing sectors were information and communication (6.7%) and construction (4.0%), although slower than the national average.

3.22 The period 2010-2016 saw the number of Eastleigh businesses grow by a respectable 3.3% per annum higher than the Solent LEP and the UK. The digital sector (ICT) has been the fastest industry sector in the Eastleigh

[10] Initially there are 11 broad sectors in the analysis but other production and agriculture are both small as percentages of overall businesses in the borough.

economy with a yearly growth of 4.7% since 2010[11]. Growth was driven in the borough by the two dominant sectors: business services and distribution, food, transport and accommodation.

Table 3.5: Business Growth in Eastleigh, the Solent LEP and the UK. Periods: 2015-2016 and 2010-2016.

2015-2016

Industry	Eastleigh: Distribution in 2016 (%)	Eastleigh: Businesses Change Number	Eastleigh: Annual Growth Rate (%)	Solent: Annual Growth Rate (%)	United Kingdom: Annual Growth Rate (%)
Distribution, food, transport and accommodation	28.5	275	18.2	2.1	1.6
Information and communication	7.6	30	6.7	5.4	7.2
Manufacturing	6.0	15	4.2	3.9	2.3
Construction	14.4	35	4.0	7.3	6.0
Financial and insurance activities	2.3	5	3.6	0.0	4.4
Business services	23.5	50	3.5	5.7	5.6
Public admin, defence, education and health	8.0	10	2.0	2.5	2.5
Agriculture, forestry and fishing	0.9	0	0.0	0.0	0.4
Other production	0.5	0	0.0	4.8	6.9
Real estate activities	2.6	0	0.0	1.3	2.7
Other services	5.7	-5	-1.4	-0.6	1.1
Column Total	**100.0**	**415**	**7.1**	**3.7**	**3.5**

2010-2016

Industry	Eastleigh: Distribution in 2016 (%)	Eastleigh: Businesses Change Number	Eastleigh: Average Annual Growth Rate (%)	Solent: Average Annual Growth Rate (%)	United Kingdom: Average Annual Growth Rates (%)
Other production	0.5	15	12.2	2.9	5.9
Information and communication	7.6	115	4.7	4.2	5.8
Business services	23.5	315	4.1	3.8	5.5
Distribution, food, transport and accommodation	28.5	375	4.0	0.9	1.1
Agriculture, forestry and fishing	0.9	10	3.4	1.2	1.2
Manufacturing	6.0	65	3.2	1.6	0.5
Public admin, defence, education and health	8.0	75	2.7	1.8	2.5
Construction	14.4	100	2.0	1.9	1.6
Financial and insurance activities	2.3	15	1.8	0.1	1.6
Real estate activities	2.6	15	1.6	1.3	2.6
Other services	5.7	0	0.0	0.2	1.4
Column Total	**100.0**	**1,100**	**3.3**	**1.9**	**2.6**

Source: ONS (2016). Note: Green shaded cells represent sector industries with a greater annual growth than the national average since 2015.

[11] Although the other production sector has the highest average annual growth rate (12%), this growth is irrelevant since this sector changed only 15 businesses more since 2010 in Eastleigh and is relative small sector

3.23 Business growth at the sub-area level is represented in Table 3.6. In the borough, annual growth was driven by the Bishopstoke, Fair Oak and Horton Heath sub-area, with 255 additional businesses (61% of all new businesses) since 2015. Also this sub-area presents the fastest business growth with a strong 10% average annual rate since 2010. The Eastleigh sub-area grew by 75 businesses (18% of all new businesses) and Hedge End, West End and Botley sub-area by 55 businesses (13% of all new businesses) between 2015 and 2016. Chandler's Ford and Hiltingbury and Burlesdon, Hamble-le-Rice and Hound saw 20 and 10 new businesses respectively on the year. Similarly, these latter sub-areas display the lowest business growth since 2010.

Table 3.6: Business Growth in Eastleigh and Five Sub-Areas. Periods: 2015-2016 and 2010-2016.

	2015-2016		**2010-2016**	
Areas	Businesses Change Number	Annual Growth Rate (%)	Businesses Change Number	Average Annual Growth Rate (%)
Bishopstoke, Fair Oak and Horton Heath	255	35.2	425	9.9
Eastleigh	75	4.4	305	3.2
Hedge End, West End and Botley	55	3.6	190	2.2
Bursledon, Hamble-le-Rice and Hound	10	1.0	115	2.1
Chandler's Ford and Hiltingbury	20	2.1	65	1.1
Eastleigh economy	**415**	**7.1**	**1,100**	**3.3**

Source: ONS 2016

3.24 Table 3.1 illustrates the number and rates of active enterprises, enterprise births (start ups) and enterprise deaths (closure) in 2015 according to the latest available data from ONS[12]. According to this source there were approximately 5,900 active businesses in Eastleigh in 2015. Businesses density by adult population (per 10,000 working age population[13]) in Eastleigh (727) is greater than the national average (654) and almost 20% larger than the Solent LEP (610).

[12] Active businesses in a reference year, defined as businesses that had either turnover or employment at any time during the reference period. A birth is identified as a new business that was present in year, but did not exist in earlier years. A death is defined as a business that was on the active file in the previous year but no longer present in the active file in current year.
[13] Population aged between 16 to 64 years old.

3.25 The borough has seen more business births (102 start-ups) and deaths (76 closures) per population than both the Solent LEP and the UK. This would suggest that the Eastleigh economy is more dynamic in terms of business creation (start-ups), but equally prone to more closures than the national average. However, using the enterprise stock as the baseline the enterprise birth rate in Eastleigh (14.0%) is broadly comparable to the Solent LEP (14.7%) and national rate (14.3%). Likewise, the death rate (10.4%) is marginally higher but broadly comparable to the Solent LEP (10.2%) and UK (9.4%). Overall, the birth rate exceeds the death rate to give a positive net growth in businesses (+210 enterprises) in 2015.

3.26 Eastleigh business survival rates are generally higher than the Solent LEP and UK on both three and five year survival cycles for start-ups.

Table 3.1: Business Demography in Eastleigh, the Solent LEP and the UK 2015

Business Demography	Eastleigh	Solent LEP	United Kingdom
Enterprise Count (Active stock)	5,890	35,450	2,672,025
Business per 10,000 adult population	727	610	654
Enterprise Births	825	5,220	383,075
Enterprise Births per 10,000 adult population	102	90	94
Enterprise Birth Rate (% of Active stock)	14.0	14.7	14.3
Enterprise Deaths	615	3,630	252,040
Enterprise Death per 10,000 adult population	76	62	62
Enterprise Death Rate (% of Active stock)	10.4	10.2	9.4
Three year survival rate (% from 2012 new births)	63.2	59.1	59.4
Five year survival rate (% from 2010 new births)	47.2	41.1	41.4

Source: ONS (2016). Note 1: Solent LEP is an aggregation of 8 districts and 3 city councils.
Note 2: working age population source is from the employment rate in the APS (ONS).

3.2. Commercial Developments

3.27 The Employment Land Review (ELR) for Eastleigh (July 2014), highlights the Borough's strengths as being defined by its current economic characteristics; most importantly high desirability of sites for office, industrial and warehousing uses[14].

3.28 According to the ELR Eastleigh has on the whole experienced lower levels of new office development compared to South Hampshire. The future economic role of Eastleigh is identified as supporting new small and medium size businesses, while identifying and helping develop niche business sectors and providing new opportunities for industrial development, namely at the Eastleigh River Side development site. The Borough is seen as playing a complimentary role in the achievement of economic growth across the region.

3.29 There has been major investment in new research facilities in recent years, including the development of the new B&Q headquarters in Chandler's Ford. There is likely to be an on-going demand for new industrial premises and for mixed office/industrial floorspace within the Borough.

3.30 The Eastleigh River Side area continues to offer redevelopment and green field development opportunities, but is constrained by a lack of suitable road access.

3.31 Completions of industrial and office floorspace[15] between 2005 and 2016 total 109,984m^2, although deductions from the existing commercial floorspace stock through losses, either to residential, (for example, the former Premier Foods site, Toynbee Road) or through replacement Commercial uses, (such as the former Manor Bakeries site in Leigh Road) have resulted in a loss of 102,864m2. This gives a net gain of 7,120m^{2}over the 2005-2016 period.

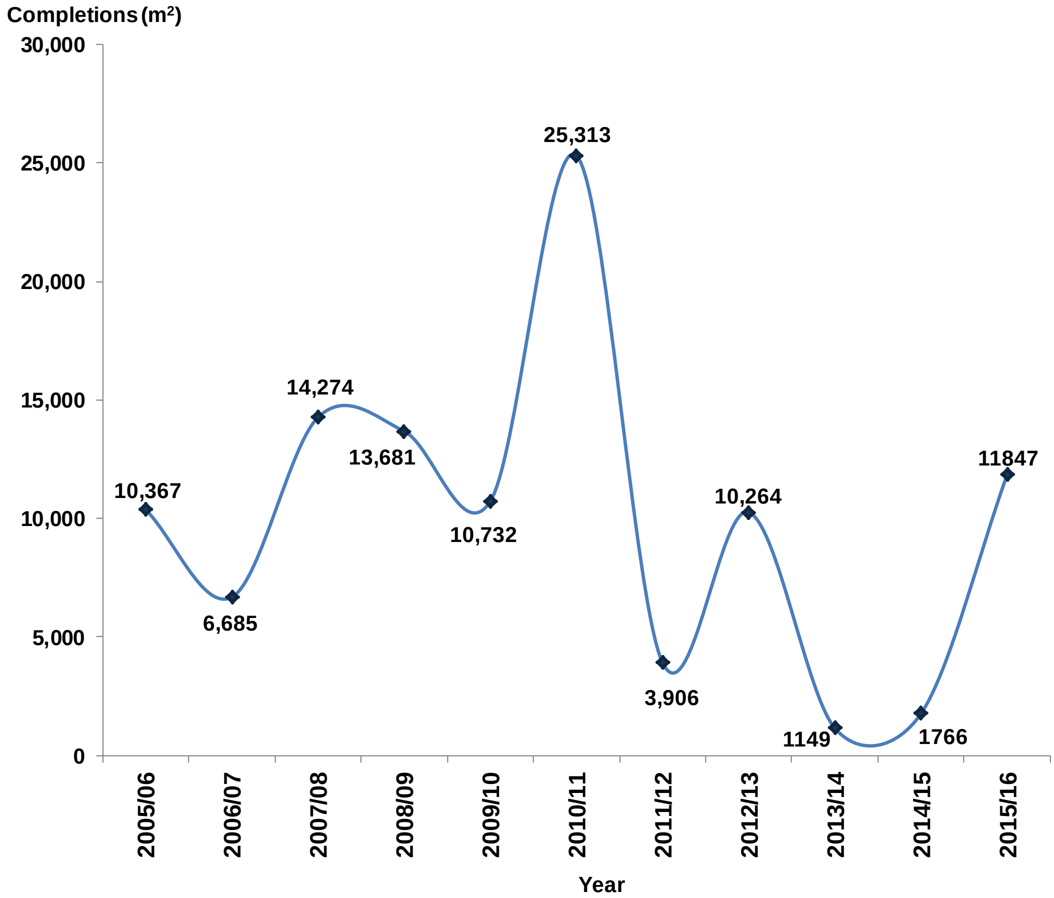
3.32 Gross floorspace, completions, which do not include losses through redevelopment of existing industrial sites, or losses of industry to other uses,

[14] Eastleigh Borough Council (2016), Employment Land Review Part 1, Economic and Employment Land Baseline Report, July 2014

[15] Hampshire County Council, Industrial Land and Office Floorspace, Gross Completions, Metres Squared, accurate as of December 2016.

are shown in Figure 3.5. The figures for Eastleigh have fluctuated markedly over the decade (2005-2015).

Figure 3.5: Gross Floorspace Completions (m2) 2005-2016

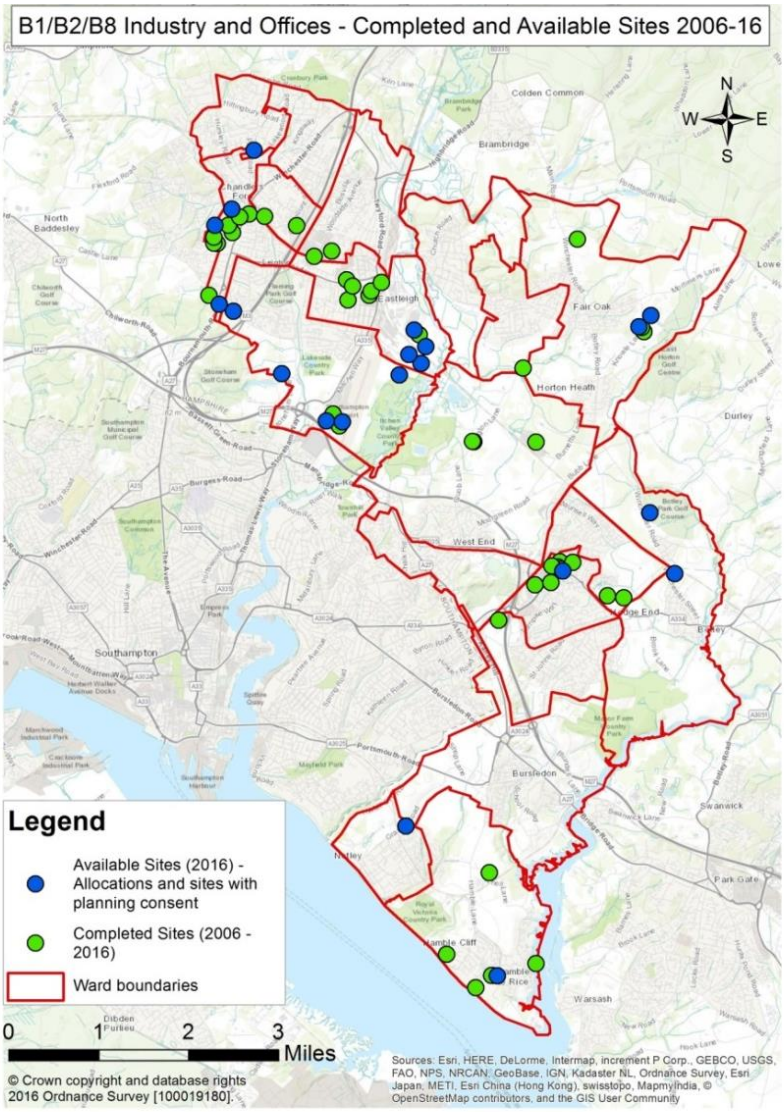


Source: Hampshire County Council

3.33 After depressed periods in 2013/14 and 2014/15 there has been a substantial increase in completions during 2015/16, with the partial redevelopment of the GE Aviation Systems (aero-structures) site at Kings Avenue, Hamble, totalling 9,512m^2 a major contribution to the increase in commercial activity. This trend is also reflected county-wide, with completion levels returning close to pre-recession levels.

3.34 In 2005/6 gross floorspace completions stood at 10,367m^2, before peaking in 2010/11 at 25,313m^2. This was followed by a steep decline to hit decade lows in 2013/14 and 2014/15. The completions figures recovered in 2015/16 to 1,847m^2, which is the highest since 2010/11.

Figure 3.6: Industrial and Commercial Sites – Completed and Available Sites



Source: Hampshire County Council (2016)

3.35 Completions throughout the period from 2005-2015 have been largely concentrated around the major industrial and office areas below.

- Chandlers Ford Industrial Estate
- Botleigh Grange Office Campus
- Hedge End/Hamilton Business Park
- Southampton Airport
- Hamble Lane
- B&Q's research facility at Chandlers Ford

Completed commercial sites are shown in Figure 3.6

4. Labour Markets

4.1 This chapter looks at a number of key labour market indicators that provide an overview of the health of the labour market in Eastleigh. The occupational and industry structure is then explored, before moving on to resident and workplace earnings and new experimental income distribution. Sub-area travel to work, car ownership and commuter flows help to explain thee extent and direction of commuters to and within the borough. The last two sections look at unemployment and benefit claimants and qualifications and skills.

4.1 Employment, occupations and earnings

4.2 There are different measures of employment depending on the spatial output available. At the national and regional level the Government's preferred measure is the International Labour Organisation (ILO) definition taken from the Labour Force Survey. It is primarily from this source that the Government and media report on employment. At the sub-regional level and down to local authority districts the ILO equivalent measure is provided by the Annual Population Survey (APS) employment estimates. Below the local authority level the only measure available is the Business Register and Employment Survey (BRES)[16].

4.3 With reference to Table 4.1 and the Annual Population Survey (APS) estimate, Eastleigh has an estimated 67,000 residents in employment for the 12 months to June 2016, accounting for 82.0% of the working age resident population. This places Eastleigh in the highest 20% employment rates in the country[17]. This rate is well above both the Solent LEP (76.1%) and UK average (73.7%). Employment rates have been steadily increasing since 2012 as the country experiences economic growth and record levels of employment. On workplace based employment the 2015 BRES survey data estimate approximately 63,000 employees in Eastleigh, of which almost 70%

[16] The BRES survey is subject to sampling and rounding error that increases as the spatial geography becomes smaller and industry sectors are introduced. All BRES statistics are an indication of possible employment in Eastleigh. BRES data does not include armed forces personnel or most self-employed workers. Below the regional level BRES does not include farm labourers. BRES data will sometimes record all agency workers or staff at a headquarters as working locally, while in reality they may work across the country. Where a figure does not sit right then local intelligence may be needed to verify the situation.

[17] In Hampshire, only Rushmoor (86.8%) and Winchester (83.1%) are higher.

are full-time, which is similar to the national average but above the Solent LEP. Eastleigh employee estimates are up on the year by 3,000 workers and by 2,000 on 2010.

Table 4.1: Key Labour Market Indicators for Eastleigh

	Eastleigh		Solent*		National** (UK/GB)	
	%	Number	%	Number	%	Number
Employees	100.0	63,000	100.0	515,000	100.0	28,531,000
Full-time	69.8	44,000	66.4	342,000	69.1	19,719,000
Part-time	30.2	19,000	33.6	173,000	30.9	8,812,000
Employment (16-64)	82.0	67,200	76.1	574,200	73.7	30,161,300
Self-employment (16-64)	14.9	10,000	12.8	73,400	14.0	4,211,500
Economic Activity (16-64)	84.5	69,200	80.0	603,400	77.7	31,828,100
Modelled unemployment	3.1	2,200	4.7	29,300	5.2	1,666,800
% Qualified to NVQ 4+ (16-64)	30.9	25,000	32.4	245,600	36.9	15,022,900
% No qualification (16-64)	5.0	4,000	6.5	49,400	8.8	3,579,100
% Workforce in higher order occupations	45.9	32,500	42.6	254,300	44.5	13,929,700
Median gross weekly earnings (workplace)	520	~	530	~	540	~
Median gross weekly earnings (resident)	550	~	530	~	540	~

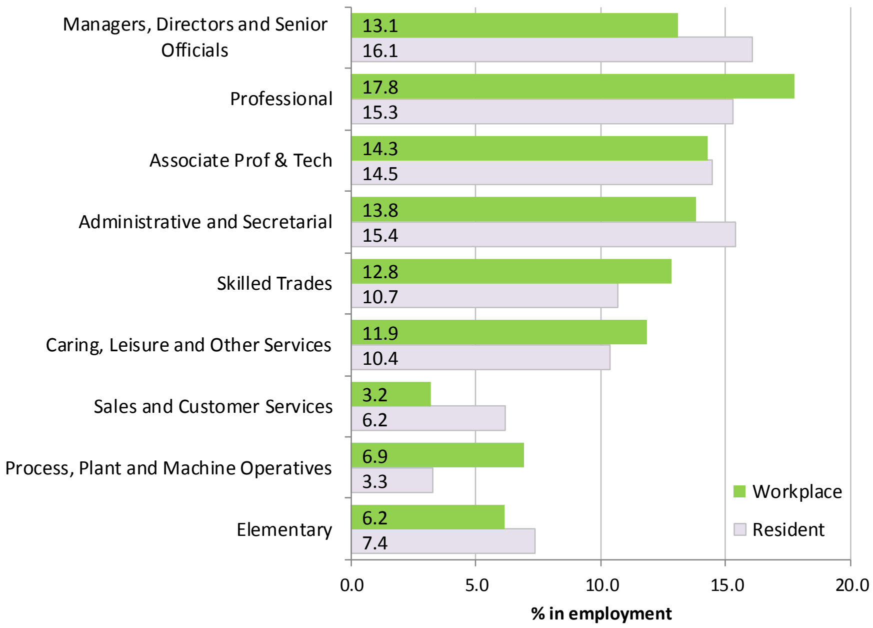
Sources: ONS (2016). *Solent definition is the new OA based ONS version. **National is Great Britain for BRES and United Kingdom for all other indicators.

4.4 One of the post-recession trends in the labour market has been the growth in self-employment, and Eastleigh is no different to the national picture. The APS self-employment rate in Eastleigh is 14.9%, which is just over two percentage points above the Solent LEP (12.8%), and slightly above the UK average (14.0%). However, self-employment in Eastleigh has risen by 5.2 percentage points on 2010, more than twice as fast as Solent LEP (2.1ppts) and above national change (1.2ppts).

4.5 Unemployment, on the broader (modelled) measure, is lower in Eastleigh (3.1%) when compared to the Solent LEP (4.7%) and the national average (5.2%). Overall unemployment has been in relatively steady decline since 2012, a trend replicated across much of the country. Eastleigh has seen unemployment fall from 5.2% in 2010 to 3.1%, a difference of 2.1 percentage points. This decline is comparable to both the Solent LEP (-2.3ppts) and UK (-2.6ppts).

4.6 The proportion of residents with a NVQ level 4 or higher (degree or equivalent) is lower in Eastleigh (30.9%) when compared to the Solent LEP (32.4%) and the national average (36.9%), and this could effect the occupational structure. The proportion of Level 4+ residents appears to be down on earlier years. Nonetheless, the percentage of those in employment in higher order occupations is marginally higher in Eastleigh (45.9%) than the Solent LEP (42.6%) and national average (44.5%).

Figure 4.1: Occupational[18] Structure of Eastleigh Resident and Workplace Workers



Source: ONS (2016).

4.7 With reference to Figure 4.1, the top three occupations account for just under half of both Eastleigh resident (45.9%) and workplace workers (45.2%). The Eastleigh profile for the top three occupations on both the resident and workplace based estimates is very similar to the Solent LEP and UK average. Workplace occupations in Eastleigh are more represented in professional, skilled trades, caring/leisure/other services and in process, plant and machine

[18] A person's occupation relates to their main job and is derived from either their job title or details of the activities involved in their job.

operative occupations. Employed residents have a higher concentration amongst Managers/Director/Senior Officials, sales and customer services and elementary occupations. There is little difference in associate professional and technical occupations.

Table 4.2: Occupational[19] Structure of Eastleigh Residents Workers (aged 16-74)

Occupation	Bishopstoke, Fair Oak and Horton Heath	Bursledon, Hamble-le-Rice and Hound	Chandlers Ford and Hiltingbury	Eastleigh (sub-area)	Hedge End, West End and Botley	Eastleigh (Borough)
Managers, Dir.& senior officials	10.1	12.6	12.2	8.2	12.2	11.0
Professional	16.7	17.0	24.6	15.1	17.7	18.0
Assoc. prof. and tech.	12.9	15.2	14.2	12.1	14.3	13.7
Administrative/ secretarial	13.8	11.5	12.6	12.3	13.7	12.9
Skilled trades	14.2	12.7	9.4	13.1	11.5	12.1
Caring, leisure & other services	9.4	8.3	8.3	10.0	8.4	8.9
Sales & customer service s	8.3	7.2	7.7	9.3	9.0	8.5
Process plant & machine op.	6.1	6.8	4.2	7.6	5.5	6.1
Elementary	8.5	8.7	6.7	12.3	7.6	8.8
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: ONS Census (2011). Green denotes percentage by occupation is above the Eastleigh average.

4.8 The only source of occupational data at the sub-area level is the 2011 Census. However, as this will not be directly comparable to the Eastleigh APS figures the census figures for the borough are included as a comparator. With reference to Table 4.2, Burlesdon, Hamble-le-Rice and Hound sub-area, Chandler's Ford and Hiltingbury sub-area and Hedge End, West End and Botley sub-area were mostly above the borough average in the top three occupations. Bishopstoke, Fair Oak and Horton Heath sub-area had proportionately more employed residents in the mid-order occupations, while the Eastleigh sub-area was proportionately higher than the borough average in the mid-to-low occupations, and notably in elementary occupations.

4.9 The local workplace based estimate of employment is provided by the annual BRES survey. For the initial analysis the 11 sectors consistent with the GVA

[19] A person's occupation relates to their main job and is derived from either their job title or details of the activities involved in their job.

analysis were explored. However, as agriculture (125 employees, 0.2%) and other production (450 employees, 0.7%) combined account for less than 1% of the employee total they have been excluded from further analysis.

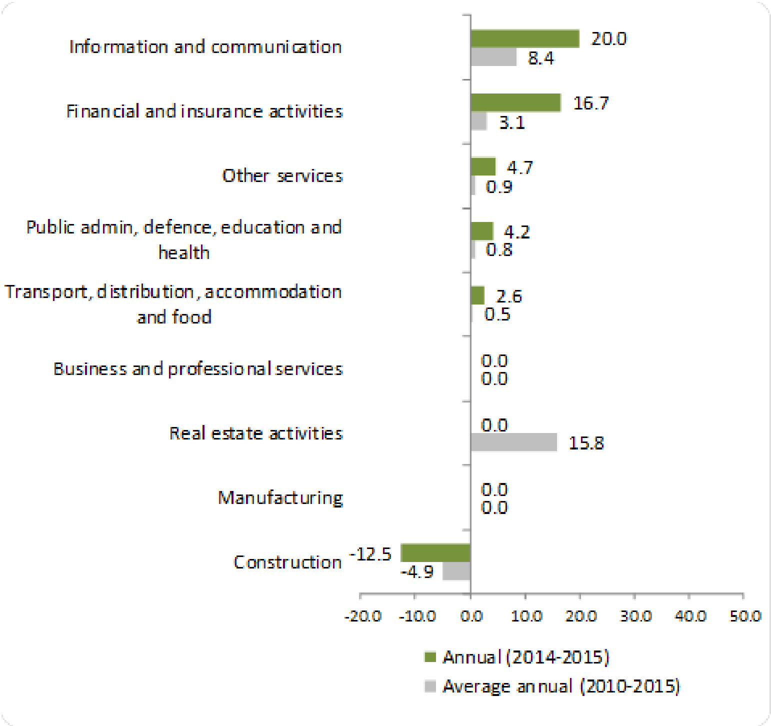
Table 4.3: 2015 Eastleigh Employee Estimates: Sector Share (%), Number and Location Quotient

	Sector employees % share	Employee Estimate	Concentration relating to GB= 1.00
Transport, distribution, accommodation and food	31.7	19,500	1.15
Public admin, defence, education and health	20.3	12,500	0.76
Business and Professional Services	15.4	9,500	0.90
Manufacturing	9.7	6,000	1.19
Construction	5.7	3,500	1.25
Financial and insurance activities	5.7	3,500	1.61
Information and communication	4.9	3,000	1.17
Other services	3.7	2,250	0.83
Real estate activities	2.0	1,250	1.22
Agriculture & Other Production	0.9	575	~
Total	100.0	63,000*	

Source: ONS (2016).*total will not equal the sum of the rounded industry estimates. The % share is based on the sector totals. Green denotes above national employee concentrations, dark green over 50% greater concentration.

4.10 The largest broad sector employer is transport, distribution, accommodation and food, with just under one third of all employees (19,500, or 31.7%) – Table 4.3. Although public admin, defence, education and health and business and professional services account for a large share of employees these sectors are less concentrated than the national average. The sector with the highest local employee concentration is financial and insurance activities, although the percentage sector share is relatively small at 5.7% (3,500 employees). Eastleigh is home to the headquarters of Ageas UK Insurance and the site of an Aviva office that help to explain the local concentration.

Figure 4.2: Annual (2014-15) and Average Annual (2010-15) Sector Growth



Source: ONS (2016)

4.11 Employee growth on the year (2014-2015) has been robust in information and communications (+20%) and financial and insurance services (+17%). Both sectors grew by an estimate 500 employees each on the year (Figure 4.2). Public admin, defence, education and health also grew by 500 employees, but as a much larger sector the growth rate was 4%. Construction was the only sector to see an annual decrease in employees, with a drop of about 12%, or 500 fewer employees. This could be a reflection of slower movement in housing and commercial development.

4.12 Since 2010, real estate has seen the fastest average annual growth rates at 15.8%, and although this is a relatively small sector in Eastleigh, the number of employees more than doubled between 2010 (600) to 1,250. In absolute terms information and communication has led on employee growth since 2010, with an average rate of 8% per annum and 1,000 more employees over the period.

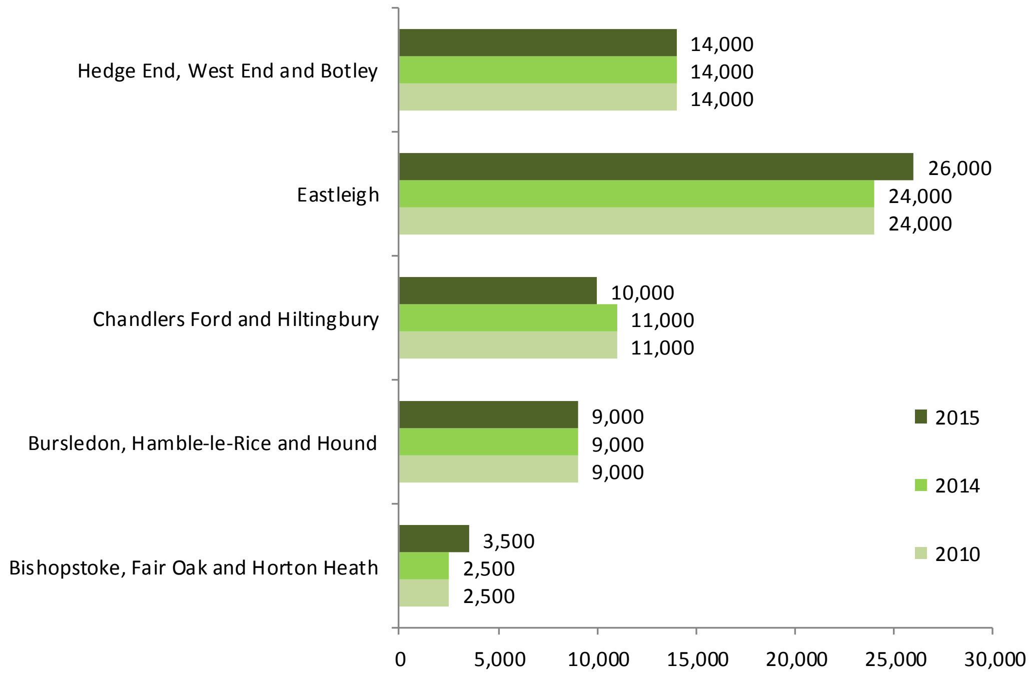
Table 4.4: Eastleigh Key Employment Sectors

	2010	2014	2015	2014-2015 Number	2014-2015 %	2010-2015 Number	2010-2015 Av. Annual %
Construction	4,500	4,000	3,500	-500	-12.5	-1,000	-4.9
Retail	7,000	7,000	7,000	0	0.0	0	0.0
Financial & Professional	5,000	5,000	6,000	1,000	20.0	1,000	3.7
Advanced Manufacturing	3,000	4,000	3,500	-500	-12.5	500	3.1

Source: ONS (2016)

4.13 Due to rounding some degree of caution is needed when interpreting the key sector statistics. The suggestion from Table 4.4 is that the financial and professional services sector is the only key sector to see employee growth on the year and since 2010. The retail sector appears to have remained static at approximately 7,000 employees. In contrast, construction has seen a contraction in annual employee growth and since 2010. Although advanced manufacturing dipped on 2014 levels it is up on 2010.

Figure 4.3: Sub-area Employee estimates 2015



Source: ONS (2016)

4.14 Sub-area analysis of BRES employee data will be subject to more disclosure rounding and less precise estimates, especially by sector. As such, all sub-area employee statistics need to be treated as indicative.

4.15 With reference to Figure 4.3, the Eastleigh sub-area has the most employees (26,000) and Bishopstoke, Fair Oak and Horton Heath the fewest (3,500). The sub-area employee statistics would suggest that annual growth in employees is also mostly accounted for by these two sub-areas. Allowing for rounding the other three sub-areas employee numbers appear constant.

Table 4.5: Sub-area Sector Profiles

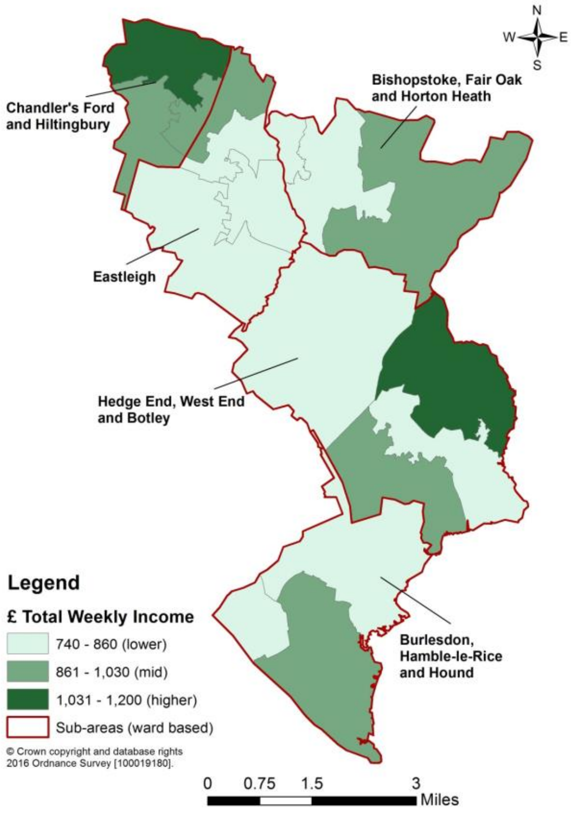
	Bishopstoke, Fair Oak and Horton Heath		Bursledon, Hamble-le-Rice and Hound		Chandlers Ford and Hiltingbury		Eastleigh		Hedge End, West End and Botley	
	No.	%	No.	%	No.	%	No.	%	No.	%
Agriculture, forestry& fishing	50	1.5	20	0.2	10	0.1	0	0.0	40	0.3
Other production	20	0.6	20	0.2	150	1.5	50	0.2	150	1.0
Manufacturing	125	3.9	3,000	33.7	1,250	12.8	1,750	6.6	600	4.2
Construction	300	9.3	450	5.1	800	8.2	1,000	3.8	1,000	7.0
Transport, distribution, accommodation & food	1,000	31.0	2,350	26.4	2,475	25.4	8,000	30.4	6,100	42.5
Information & communication	125	3.9	100	1.1	400	4.1	1,750	6.6	700	4.9
Financial & insurance	15	0.5	50	0.6	1,000	10.3	2,000	7.6	350	2.4
Real estate	20	0.6	100	1.1	125	1.3	1,000	3.8	125	0.9
Business & Professional	425	13.2	800	9.0	1,400	14.4	5,250	19.9	1,750	12.2
Public admin, defence, education & health	1,000	31.0	1,550	17.4	1,800	18.5	4,750	18.0	2,925	20.4
Other services	150	4.6	450	5.1	325	3.3	800	3.0	600	4.2

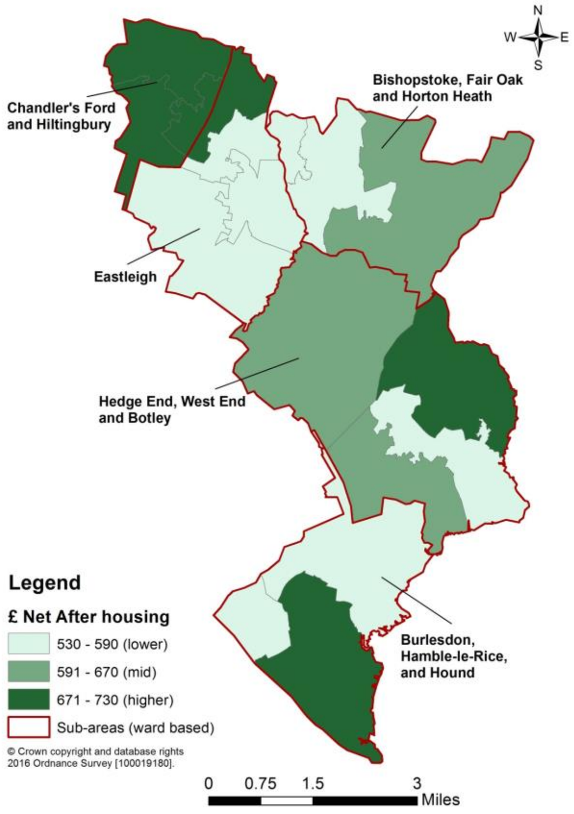
Source: ONS (2016). Green shaded cell denotes the highest proportion in each sector.

4.16 Transport, distribution, accommodation and food and public sector is strongly represented across all five sub-areas. This is mostly down to wholesale and retail, although in Eastleigh there is also a sizeable transport and storage presence. Elsewhere, each sub-area has proportionately higher sector presences in the following industries relative to each other (see Table 4.5)

- Bishopstoke, Fair Oak and Horton Heath: Public admin, defence, education and heath (31.0%, 1,000) and Construction (9.3%, 300). The public sector presence is mostly education, with Wyvern Technology College a relatively large employer.
- Burlesdon, Hamble-le-Rice and Hound: Manufacturing (33.7%, 3,000).
- Chandler's Ford and Hiltingbury: Financial and insurance (10.3%, 1,000).
- Eastleigh: Business and professional (19.9%, 5,250), Information and communications (6.6%, 1,750) and Real estate (3.8%, 1,000). Business and professional is mostly professional.
- Hedge End: Transport, distribution, accommodation and food (42.5%, 6,100), but is mostly in wholesale and retail (4,500).

Figure 4.4: Household Income (2013-2014)





Source: ONS (2016). Natural breaks based on Income ranges within Eastleigh.

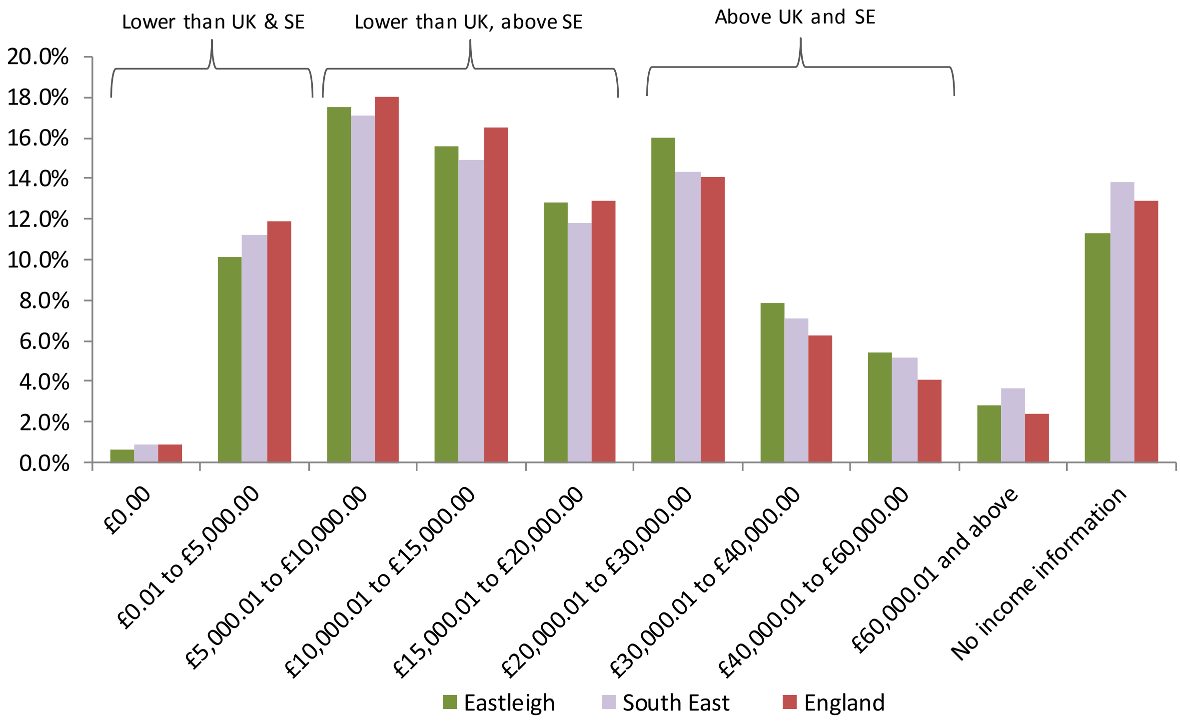
4.17 While ASHE data provides workplace and resident earnings there is limited small area income data available and the only widely accessible source is the Office for National Statistics 2013-2014 modelled household income based on the MSOA. The two maps in Figure 4.4 show total weekly household income which is the sum of the gross income of every member of the household plus any income from benefits such as Working Families Tax Credit, and net weekly household income after housing costs (equivalised net income minus housing costs[20]).

4.18 Total household incomes are higher in the Chandler's Ford and Hiltingbury sub-area (Hiltingbury wards) and in Hedge End, West End and Botley sub-area (Botley Ward and Hedge End Grange Park Ward). Burlesdon, Hamble-Le-Rice and Hound sub-area is a mix of lower to mid range. The Eastleigh sub-area is mostly towards the lower household income range and this spreads out eastwards in the neighbouring sub-areas and in to the Bishopstoke and West End wards.

4.19 The picture is broadly similar once net and housing costs are factored in, although Hamble-le-Rice and Butlocks Heath Ward edges into the higher range and West End wards move into the mid-range. Lower income areas are concentrated in the Eastleigh sub-area and Bishopstoke wards. There is a pocket of lower income households in Netley Abbey Ward and in parts of Botley and Hedge End Wildern wards. All of the Chandler's Ford and Hiltingbury sub-area falls within the higher household income bracket within Eastleigh.

[20] Net household weekly income is the sum of the net income of every member of the household. It is calculated using the same components as total income but income is net of: income tax payments; national insurance contributions domestic rates/council tax; contributions to occupational pension schemes; all maintenance and child support payments, which are deducted from the income of the person making the payments; and parental contribution to students living away from home, and rent (gross of housing benefit); water rates, community water charges and council water charges; mortgage interest payments (net of any tax relief); structural insurance premiums (for owner occupiers); and ground rent and service charges.

Figure 4.5: Experimental Income Distributions



Source: ONS (2016).

4.20 The ONS has produced the first experimental Administrative Data Census Research Outputs[21] on income at the local authority level based on individual gross annual income distributions from personal level income and benefits data. Although not official statistics the data would suggest that Eastleigh has fewer individuals on lower incomes compared to the regional and national averages. From approximately £10,000 to £20,000 Eastleigh still has fewer individuals on lower to mid incomes than the UK, but more than the South East (Figure 4.5). From £20,000 to £60,000 Eastleigh has marginally more individuals on mid-to higher incomes than both the regional and national average. On the highest income band Eastleigh and England are below the South East (Figure 4.5).

[21] These outputs are NOT official statistics on income. Rather they are published here as outputs from our continued research into the production of income statistics from administrative data sources

4.2 Travel to Work

4.21 In the 2013/14 edition of the Eastleigh Local Economy report the main method of travel to work and access to at least one car was explored using the 2001 and 2011 Census. As the next census is not due until 2021 these figures have not been updated and the findings remain pertinent.

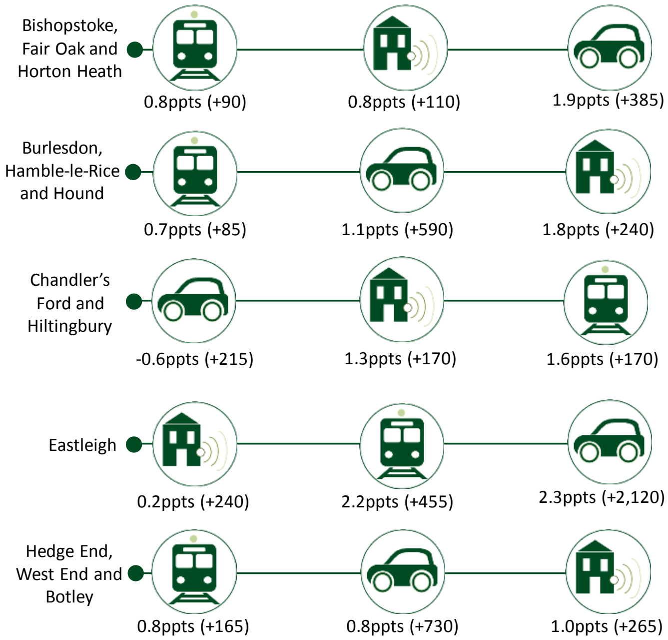
4.22 The key findings in the 2013/14 edition highlighted an increase in the number of Eastleigh residents working mainly at or from home, or travel to work by train or car. In contrast, smaller proportions travelled by bus, were passengers in a car or van, walked, cycled or rode a motorcycle. The rise in driving to work reflects the increase in car ownership over the decade which nationally saw on average, 11 cars per 10 households in 2001, compared to 12 in 2011.

4.23 In 2011 Eastleigh had the second highest proportion of residents with access to at least one car across the Solent LEP local authorities – only Gosport was higher. The increase in home working signals the general shift in working patterns facilitated by the growing adoption of flexible working arrangements, rising self-employment and improvements in broadband coverage with faster connection speeds..

4.24 The 2016 Eastleigh Local Economy report further explores the Census data to look at travel to work data, households with access to a car or van and commuter flows for the five Eastleigh sub-areas. Sub-area commuter analysis uses the middle super output area (MSOA).

4.25 Two sub-areas have a good alignment with the MSOA (Burlesdon, Hamble-le-Rice and Hound and Hedge End, West End and Botley), whereas two MSOA covering the remaining sub-areas had an imperfect fit with the wards, but with most of the areas falling within Eastleigh. The small overlaps were mostly residential areas of Hiltingbury East and Chandler's Ford East wards and Bishopstoke West Ward, and as such the two MSOA were allocated to the Eastleigh sub-area.

Figure 4.6: Method of Travel to Work Change in Proportions 2001-2011



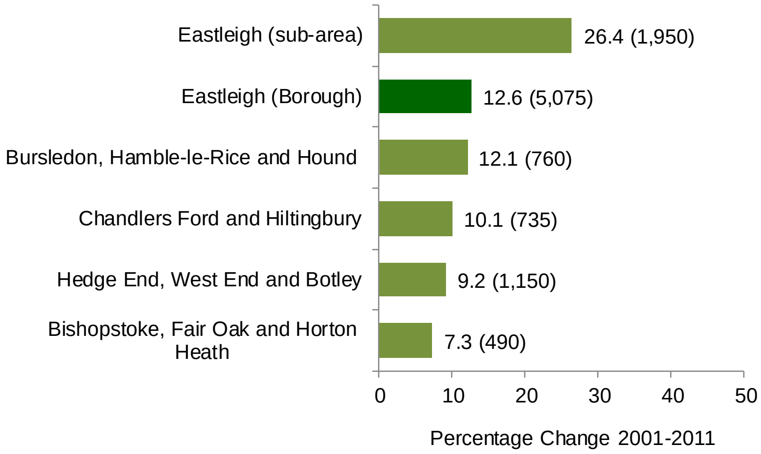
Source: ONS Census (2001-2011). Figures rounded to nearest 5. ppts (percentage point change on proportions). Figures in brackets are absolute change between 2001 and 2011 numbers

4.26 At the sub-area, commuting by car or train and working mainly at or from home were also the main areas of growth between 2001 and 2011 (Figure 4.6). However, there are some subtle variations. Travelling by car saw the highest positive change in proportions in the Bishopstoke, Fair Oak and Horton Heath and Eastleigh sub-areas, but saw a proportionate decline in Chandler's Ford and Hiltingbury (although the absolute number increased).

4.27 Working mainly at or from home was the highest positive proportionate change in Burlesdon, Hamble-le-Rice and Hound and Hiltingbury and Hedge End, West End and Botley sub-areas, while the train was proportionately first in Chandler's Ford and Hiltingbury sub-area.

4.28 Travel by train grew the most in Eastleigh and Chandler's Ford and Hiltingbury sub-areas which might reflect their proximity to Eastleigh, Chandler's Ford and Southampton Airport Parkway stations.

Figure 4.7: Change in the Number of Households who Own One or More Cars or Vans



Source: ONS Census (2001-2011). Figures in brackets rounded to nearest five denote additional households in 2011 with one or more cars/vans.

4.29 The Eastleigh sub-area has the largest percentage change in households owning one or more cars or vans between 2001 and 2011 (Figure 4.7). The number of car owning households increased by over 25% and close to 2,000 more households with one or more cars or vans. The four sub-areas were below the Eastleigh Borough average (12.6%).

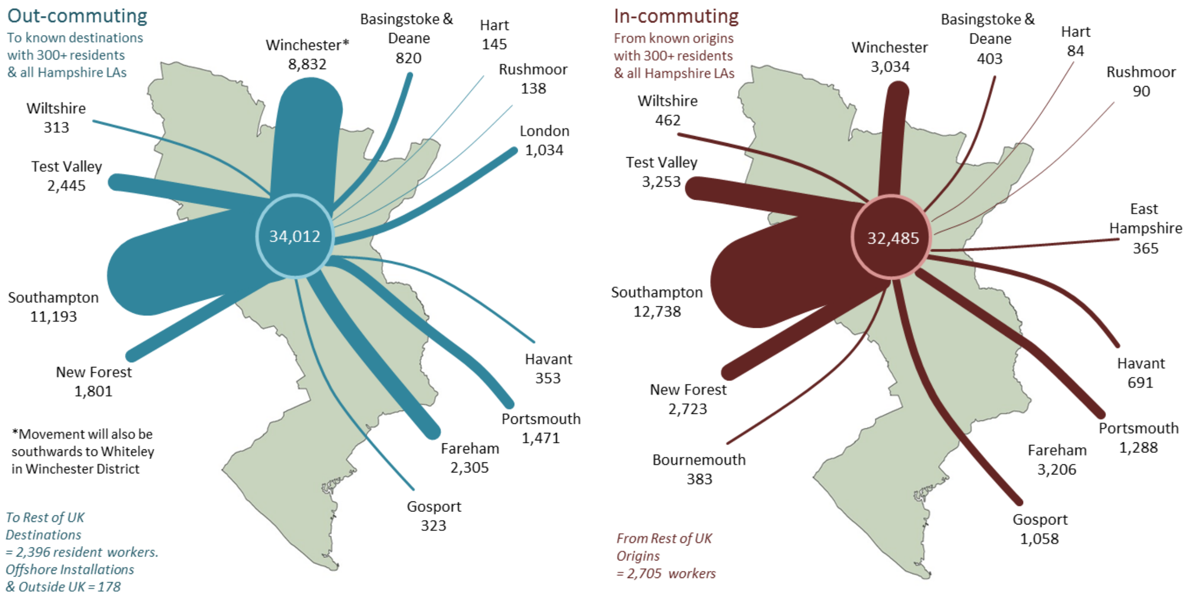
4.30 Commuter flows were not reported in the Eastleigh Local Economy 2013/14 edition, but nonetheless provide useful information on commuter patterns in terms of whether a sub-area is a significant employment hub i.e. a net importer of workers, or an area where residents predominantly leave the locality and travel to a place of work beyond the sub-area.

4.31 Eastleigh Borough as a whole is a small net exporter of workers (1,500), but has effectively equal resident (0.49)[22] and workplace (0.50) self-containment ratios. This means more or less that similar numbers of residents out-commute (34,000) as workers commute in (32,500) –Figure 4.8. Access to the M3 and M27 corridor combined with good rail links help to facilitate commuter flows. The main out-commuter destinations are southward to Southampton (11,100+) and to Winchester (8,800+), although flows to Winchester is both

[22] For resident self-containment a value below 0.50 means resident out-commuting is higher than those residents who live and work in the area, and vice versa for values above 0.50. For workplace self-containment a value above 0.50 means residents who live and work in the area is higher than in-commuters, and vice versa.

northwards to the City of Winchester and south to Whiteley (Solent Business Park). In-commuting is dominated by Southampton residents (12,700+) and to a lesser extent from Test Valley (3,200+) and Winchester (3,000+).

Figure 4.8: Eastleigh Commuter Flows 2011

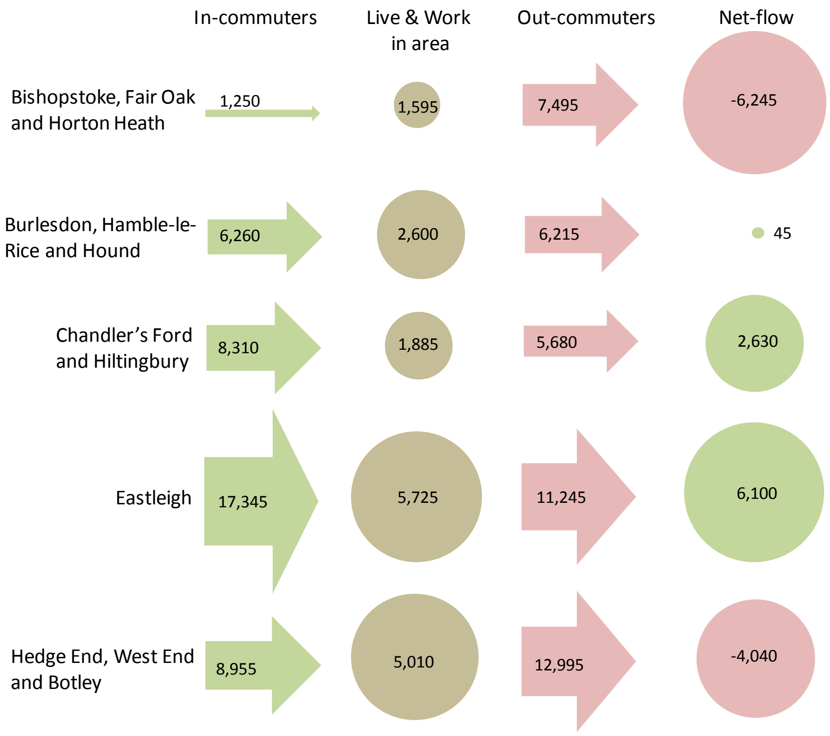


Source: ONS Census 2011 Origin-Destinations.

4.32 At the sub-area it is clear from Figure 4.9, that the Eastleigh sub-area is the primary destination for in-commuters with over 17,000 workers entering the sub-area in 2011, while the Bishopstoke, Fair Oak and Horton Heath sub-area has significantly lower in-commuting. Each flow will reflect the commercial landscape, employment opportunities, transport access and infrastructure within each sub-sector.

4.33 Eastleigh and Chandler's Ford and Hiltingbury are the two sub-areas that attract a net inflow of workers. The two sub-areas combined are home to Barton Park, Boyatt Wood Industrial Park, Chandlers Ford Industrial Estate, Hampshire Corporate Park, Phoenix Park and Southampton International Park, as well significant retail employment in the town centre. However, this is not enough to offset the large net losses of workers in the Bishopstoke, Fair Oak and Horton Heath and Hedge End, West End and Botley sub-areas that help make Eastleigh Borough an overall net exporter of labour. The Burlesdon, Hamble-Rice and Hound sub-area is effectively neutral with very similar numbers of out and in commuters.

Figure 4.9: Sub-area Commuter Flow Profiles



Source: ONS (Census 2011). Figures rounded to nearest five. Net flows with negative value and shaded pink are net outflows i.e. out-commuters exceed in-commuters.

4.34 Bishopstoke, Fair Oak and Horton Heath sub-area has the lowest resident self-containment ratio (0.25) because of high levels of out-commuting relative to residents that both live and work in the sub-area but, in reverse, has a relatively high workplace self-containment (0.67). This is down to lower in flows which mean the sub-area workforce is predominantly local. The Bishopstoke, Fair Oak and Horton Heath sub-area is the only location where local residents make up the majority of the sub-area workforce. In the other four sub-areas the level of in-flows account for the lion's share of the local workforce, not least because of the significant outflows (see Appendix for Tables).

4.35 The Eastleigh sub-area is the main destination within Eastleigh Borough for the other four sub-areas, while the primary destination within Eastleigh Borough for Eastleigh sub-area out-commuters is to Chandler's Ford and Hiltingbury.

4.36 For destinations outside of Eastleigh Borough the primary destinations for all five sub-areas are Winchester and Southampton. Fareham is also significant destination for the southern most sub-areas of Bursledon, Hamble-le-Rice and Hound and Hedge End, West End and Botley, while Test Valley also attracted residents from Chandler's Ford and Hiltingbury and Eastleigh sub-areas.

4.37 For origins outside of Eastleigh Borough the primary destinations for all five sub-areas is Southampton in all cases, and either Test Valley and Fareham depending on proximity.

4.3 Unemployment and Worklessness

4.38 At the national and regional level the Government's preferred measure is the International Labour Organisation (ILO) definition of unemployment taken from the Labour Force Survey (LFS). It is primarily from this source that the Government and media report on unemployment statistics.

4.39 At the local authority district level the recommended measure is the modelled estimates of unemployment. For Eastleigh Borough the modelled estimate of unemployment, rather than the Annual Population Survey, is used as the indicator measure in Table *[23].

4.40 Below the local authority level the only measure available is the Claimant Count. This is the more current, but much narrower definition of unemployment as it only measures unemployed claimants that are eligible and have signed on. Since its introduction in May 2013, the Claimant Count now includes some claimants of Universal Credit as well as Jobseekers Allowance claimants. In November 2015 the Claimant Count replaced the old JSA dataset as the preferred 'headline' measure of local unemployment.

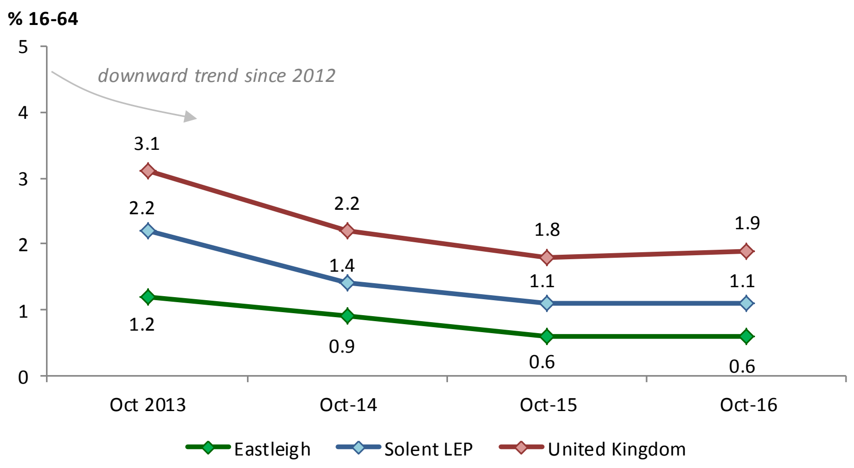
4.41 The Claimant Count combines existing/legacy JSA claimants with new claimants on Universal Credit (UC). The switch to UC has been in transition since 2013, although JobcentrePlus Offices in Hampshire only went live with UC between April 2015 and March 2016. In August 2016 the equivalent 'JSA' definition of unemployment was met in UC and data back-revised accordingly.

[23] This should be used rather than the Annual Population Survey estimates.

However, all legacy claimants are not expected to fully migrate to UC until after 2018, and possibly not until 2021[24].

4.42 The Claimant Count is not seasonally adjusted and therefore subject to more volatile seasonal demands on labour or sudden shocks in local employment. To compensate for this data are compared for the same month in different years. The Claimant Count data only goes back to 2013 and will effectively pick up from the Eastleigh Local Economy 2013/14 publication.

Figure 4.10: Working Age Claimant Count Rates 2013-2016



Source: ONS (2016).Solent LEP counts use the new ONS definition based on Output Areas, while the rate is estimated using 2014 and 2015 MSOA Mid-Year estimates. As such, Solent LEP rates are indicative.

4.43 The Claimant Count does not go back earlier than 2013, but previous unemployment data shows a broadly continuous downward trend line since 2012. Eastleigh is consistently below the Solent LEP and UK averages over the period (Figure 4.10). The Claimant Count rate in Eastleigh has halved from 1.2% in 2013 to 0.6% in 2016. Likewise in the Solent LEP the rate has halved from 2.2% to 1.1%, while the UK decreased by approximately 40% on 2013. The gap in the Claimant Count rate in Eastleigh has narrowed against both the UK and the Solent LEP. The gap with the UK was 1.9 percentage points in 2013 but 0.9 of a percentage point in 2016. The gap with the Solent LEP was one percentage point in 2013 but half a percentage point in 2016.

[24] Unlike JSA, to comply with Department for Work and Pensions (DWP) disclosure protocols all Claimant Counts are rounded to the nearest five claimants. Claimant Count flows and duration data are not currently available and are unlikely to be until the UC transition is completed. Therefore, duration data can not be updated in this report.

This is mostly down to low rates in Eastleigh to begin with and the national LEP averages catching up i.e. improving in line with economic growth.

4.44 The number of claimants in Eastleigh has fallen from 1,000 in October 2013 to around 500 in 2016. Most of the reduction in claimants took place between 2013 and 2014, as indicated by Figure 4.10 above, but has been levelling out from 2015 onwards.

Table 4.6: Sub-area Working Age Claimant Count Rates 2013-2016

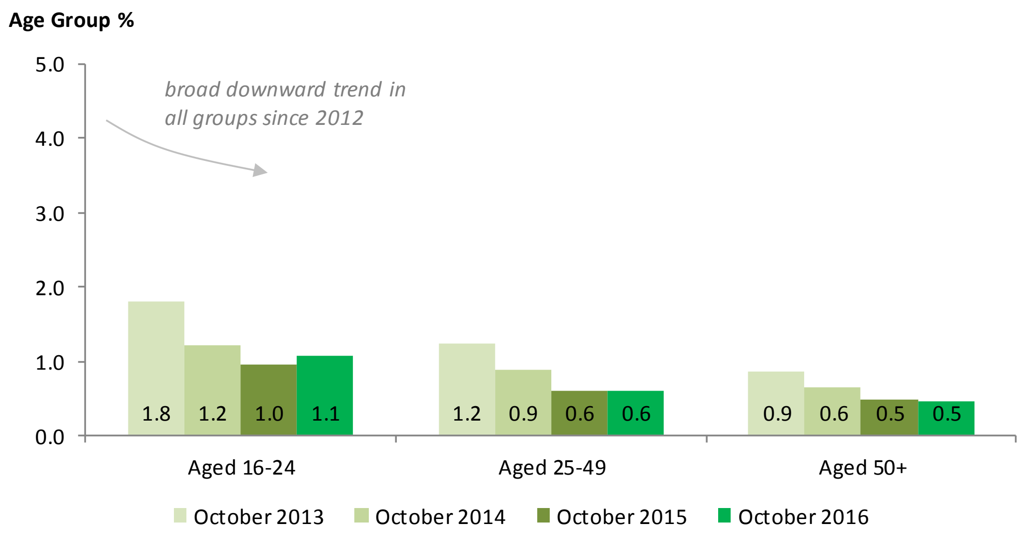
	Oct 2013	Oct 2014	Oct 2015	Oct 2016	Change on Year	Change on 2013
Bishopstoke, Fair Oak and Horton Heath	0.9	0.7	0.5	0.4	-0.1	-0.5
Bursledon, Hamble-le-Rice and Hound	1.3	0.9	0.7	0.7	0.0	-0.6
Chandlers Ford and Hiltingbury	0.9	0.5	0.4	0.5	0.1	-0.4
Eastleigh	2.0	1.5	1.0	0.9	-0.1	-1.1
Hedge End, West End and Botley	0.9	0.6	0.4	0.6	0.2	-0.3
Eastleigh Borough	1.2	0.9	0.6	0.6	0.0	-0.6

Source: ONS (2016). Pink shaded cells denote sub-areas with rates above the Eastleigh Borough average. Green under change denotes percentage point change greater than the Eastleigh Borough average.

4.45 The Claimant Count rates for the five sub-areas have been calculated from aggregated ward mid-year population estimates[25]. Bursledon, Hamble-le-Rice and Hound and Eastleigh sub-areas both have rates consistently above the Borough average (Table 4.6). The highest rate in 2016 is found in the Eastleigh sub-area (0.9%), while the lowest rate is currently in the Bishopstoke, Fair Oak and Horton Heath sub-area (0.4%). None of the sub-areas are above the Solent LEP and UK averages. Although Eastleigh sub-area has the highest unemployment rates the sub-area has also seen the largest percentage point reduction on 2013 (-1.1 ppts).

[25] The Sub-area analysis uses ward aggregations which may introduce rounding error when compared to the Eastleigh borough total.

Figure 4.11: Eastleigh Borough Broad Age Group Claimant Count Rates 2013-2016



Source: ONS (2016)

4.46 Unemployment by broad age group in Eastleigh borough has fallen since 2013 and has mostly levelled out from 2015 (Figure 4.11). The October 2016 unemployment rate for 16-24 year olds was 1.1% and below both the Solent LEP[26] (1.3%) the UK (2.4%) rates. There was a marginal increase of 15 claimants aged 16-24 years on the year, but close to 100 fewer since 2013. The two older age groups have followed the same trend with current rates for 25-49 year old (0.6%) and those aged 50 and over (0.5%) both lower than the Solent LEP and UK averages – see Appendix Tables A4.10 and A4.11).

Table 4.7a: Sub-area 16-24 Year Old Claimant Count Rates 2013-2016

	Oct 2013	Oct 2014	Oct 2015	Oct 2016	Change on Year	Change on 2013
Bishopstoke, Fair Oak and Horton Heath	1.7	1.2	0.5	0.5	0.0	-1.2
Bursledon, Hamble-le-Rice and Hound	2.5	1.4	1.1	1.1	0.0	-1.4
Chandlers Ford and Hiltingbury	1.2	0.5	0.7	1.0	0.2	-0.2
Eastleigh	2.4	1.6	1.5	1.5	0.0	-0.9
Hedge End, West End and Botley	1.4	1.0	0.8	1.0	0.1	-0.4
Eastleigh Borough	1.8	1.2	1.0	1.1	0.1	-0.7

Source: ONS (2016)

[26] MSOA definition

Table 4.7b: Sub-area 25-49 Year Old Claimant Count Rates 2013-2016

	Oct 2013	Oct 2014	Oct 2015	Oct 2016	Change on Year	Change on 2013
Bishopstoke, Fair Oak and Horton Heath	1.0	0.8	0.4	0.4	0.0	-0.6
Bursledon, Hamble-le-Rice and Hound	1.1	0.9	0.6	0.6	0.0	-0.5
Chandlers Ford and Hiltingbury	0.9	0.5	0.4	0.4	0.0	-0.5
Eastleigh	2.1	1.6	1.1	0.9	-0.2	-1.2
Hedge End, West End and Botley	0.9	0.6	0.4	0.6	0.2	-0.4
Eastleigh Borough	1.2	0.9	0.6	0.6	0.0	-0.6

Source: ONS (2016). Pink shaded cells denote sub-areas with rates above the Eastleigh Borough average. Green under change denotes percentage point change greater than the Eastleigh Borough average.

Table 4.7c: Sub-area 50+ Year Old Claimant Count Rates 2013-2016

	Oct 2013	Oct 2014	Oct 2015	Oct 2016	Change on Year	Change on 2013
Bishopstoke, Fair Oak and Horton Heath	0.5	0.3	0.6	0.3	-0.2	-0.1
Bursledon, Hamble-le-Rice and Hound	0.9	0.4	0.4	0.4	0.0	-0.5
Chandlers Ford and Hiltingbury	0.7	0.3	0.2	0.3	0.1	-0.3
Eastleigh	1.7	0.5	0.8	0.6	-0.2	-1.1
Hedge End, West End and Botley	0.6	0.2	0.4	0.5	0.1	-0.1
Eastleigh Borough	0.9	0.6	0.5	0.5	0.0	-0.4

Source: ONS (2016). Pink shaded cells denote sub-areas with rates above the Eastleigh Borough average. Green under change denotes percentage point change greater than the Eastleigh Borough average.

4.47 Tables 4.7a to 4.7c show sub-area Claimant Counts by broad age group. The Eastleigh sub-area has rates consistently above the Eastleigh borough average across all three groups, but has also seen above average reductions in rates on the year and since 2013. Bursledon, Hamble-le-Rice and Hound sub-area also has above the borough average for 16-24 year old unemployment, but is generally in line with or lower on the other two age groups. The other three sub-areas are generally in line with or lower than the borough average.

Table 4.8: Working Age Client Group Benefit Claimants

	Eastleigh May 2016 (Number)	Eastleigh May 2016 Rate (%)	Rate Change on May 2015	Rate Change on May 2010	Solent LEP May 2016 %	GB May 2016 %
Total Claimants	5,590	6.9	-0.4	-1.7	8.9	11.5
*Job seeker**	*390*	*0.5*	*-0.1*	*-1.3*	*0.8*	*1.3*
ESA and incapacity benefits	*2,880*	*3.6*	*0.0*	*-0.1*	*4.7*	*6.2*
Lone parent	*480*	*0.6*	*0.0*	*-0.4*	*0.9*	*1.0*
Others on income related benefit	*80*	*0.1*	*0.0*	*-0.2*	*0.2*	*0.2*
Main out-of-work benefits	3,820	4.8	-0.1	-2.0	6.7	8.7
Disabled**	760	0.9	-0.2	0.0	0.8	0.9
Carer	860	1.1	0.1	0.4	1.3	1.7
Bereaved	140	0.2	0.0	0.0	0.1	0.2

Source: DWP (2016). *JSA excludes UC claimants. ** Disabled excludes PIP claimants

4.48 The DWP also produce Client Group benefit statistics that assigns each benefit claimant to only one type of benefit based on a hierarchical model. This removes any double counting of benefit claimants, but will also mean multiple benefit claims are only counted the once. The data should be viewed with a degree of caution as the Client Group data does not currently include claimants on Universal Credit (UC) or those on Personal Independence Payment (PIP)[27].

4.49 If you live in Eastleigh you are less likely to claim benefits than in the UK as a whole. Eastleigh recorded close to 5,600 benefit claimants in May 2016, which accounts for 6.9% of the working age population (Table 4.8). The Eastleigh rate is lower than both the Solent LEP (8.9%) and National average (11.5%). The number of total claimants in Eastleigh has potentially fallen by 250 on the year and by over 1,000 claimants since 2010, although this does not account for more recent claimants on UC or PIP benefits that are currently excluded.

4.50 The main out-of-work benefit that combines four 'unemployed' income benefits saw Eastleigh have approximately 3,800 claimants (4.8%), of which

[27] The first will underestimate the JSA element as new claimants will be on UC, while some JSA claimants may have migrated across to UC. The second potentially impacts on Disability Living Allowance (DLA), which is being phased out by PIP. In addition to the total claimant and single benefit types the DWP combines four out of work benefits. This includes claimants of unemployment-related benefits (JSA), Employment and Support Allowance (ESA), Lone Parent and other income related benefits. These claimants, subject to changes in circumstances or health, are potentially available to the labour market

Employment Support Allowance (ESA) constitutes the largest share of claimants. The rate is lower than both the Solent LEP (6.7%) and the national average (8.7%). The number of main out-of-work benefits In Eastleigh is potentially down by 130 on the year and approximately 1,600 since 2010. The decrease on main out-of-work benefits is higher than for total benefits due to an increase of 280 claimants on Carer allowance since 2010.

Table 4.9: Sub-area Working Age Client Group Benefit Claimants

	Bishopstoke, Fair Oak and Horton Heath		Bursledon, Hamble-le-Rice and Hound		Chandlers Ford and Hiltingbury		Eastleigh		Hedge End, West End and Botley	
	No.	%	No.	%	No.	%	No.	%	No.	%
Total claimants	765	5.9	990	8.3	575	4.5	1,840	10.3	1,405	6.0
*Job seekers**	*45*	*0.3*	*80*	*0.7*	*35*	*0.3*	*145*	*0.8*	*90*	*0.4*
ESA and incapacity benefits	*385*	*3.0*	*525*	*4.4*	*295*	*2.3*	*970*	*5.4*	*695*	*3.0*
Lone parents	*60*	*0.5*	*70*	*0.6*	*30*	*0.2*	*200*	*1.1*	*105*	*0.4*
Others income related benefits	*10*	*0.1*	*15*	*0.1*	*10*	*0.1*	*30*	*0.2*	*25*	*0.1*
Main out-of-work benefits	500	3.9	690	5.8	370	2.9	1,345	7.5	915	3.9
Disabled**	110	0.9	115	1.0	95	0.7	225	1.3	215	0.9
Carers	135	1.0	155	1.3	90	0.7	235	1.3	235	1.0
Bereaved	20	0.2	30	0.3	20	0.2	35	0.2	40	0.2

Source: DWP (2016). *JSA excludes UC claimants. ** Disabled exclude PIP claimants. Pink shaded cells denote the benefit rate is above the Eastleigh borough average.

4.51 At the sub-area Bursledon, Hamble-le-Rice and Hound and Eastleigh have above the Eastleigh borough average for total and main out-of-work benefits and also on a number of other benefits (Table 4.9). At 10.3% (May 2016) the Eastleigh sub-area total claimant rate is above the Solent LEP (8.9%) but below the national average (11.5%). This is also the case for the main out-of-work benefit rate which is 7.5% in the Eastleigh sub-area compared to 6.7% (Solent LEP) and 8.7% (Great Britain). In keeping with the Claimant Count trends Bursledon, Hamble-le-Rice and Hound and Eastleigh sub-areas have seen total benefit and main out-of-work benefit rates fall at a faster pace since 2010 than the other three sub-areas – see Appendix for Tables A4.16 an A4.17.

4.4 Qualifications and Skills

4.52 Qualifications and skills enhance employment opportunities for the individual and collectively contribute to maintaining competitiveness and raising productivity in the local economy.

Table 4.10: Levels of qualifications as percentage of working age population 2015

Working age population	Eastleigh %	Solent LEP%	United Kingdom %
with NVQ4+	30.9	32.4	36.9
with NVQ3 only	23.9	20.6	17.0
with Trade Apprenticeships	6.5	4.1	3.3
with NVQ2 only	13.4	18.0	16.2
with NVQ1 only	15.8	12.9	11.3
with other qualifications	4.6	5.4	6.5
with no qualifications	5.0	6.5	8.8

Source: ONS (2016). Note: Green cells represent a higher proportion than the Solent LEP and UK.

4.53 With just under one third of residents holding a Level 4+ qualification, Eastleigh (30.9%) is below the national (36.9%) and Solent LEP (32.4%) averages on residents with a degree or equivalent qualification (Table 4.10). This is marginally lower than the 33.6% reported in the Eastleigh Local Economy 2013/14 report.

4.54 Eastleigh with 23.9% has above the national (17.0%) and Solent LEP (20.6%) averages for residents with a least a Level 3 qualification (A-level and equivalents), although this is also down from the previous reporting period (27.6%). Level 3 and higher qualifications is core to raising prosperity and productivity through access to higher skilled and better paid jobs. Therefore, upskilling more residents from Level 3 to Level 4 would benefit the Eastleigh economy.

4.55 In contrast, Eastleigh has below average proportions of residents with no qualifications (although up on 2013-14). Elsewhere, Eastleigh has a higher proportion of trade apprenticeships (6.5%) and Level 1 (15.8%) qualified residents, and this has also risen as a proportion on the previous report.

Figure 4.12: Highest Qualification by sub-area (Census 2011)

Source: ONS (Census 2011)

4.56 There is no recent sub-area data to compare with the district level Annual Population Survey data (APS). However, the Census 2011 can be used to provide a baseline at the sub-area, albeit one that is less timely and not directly comparable to the APS data. Nonetheless, it is clear from Figure 4.12 that Chandler's Ford and Hiltingbury sub-area has the highest qualified resident population (aged 16-74yrs), with over one in three residents (37.1%) holding a Level 4 qualification. This is well above the Eastleigh borough average (27.9%), Solent LEP (27.2%) and national averages (27.4%). In contrast, the Eastleigh sub-area has the lowest percentage of graduate level residents (22.5%). The five sub-areas were all below the national average (22.5%) for residents with no qualifications, although the Eastleigh sub-area (20.6%) was marginally above the Solent LEP average (20.2%).

Table 4.11: Job-related training in the last 13 weeks 2016

	Eastleigh				Solent LEP			UK		
	Number	**%**	**Males**	**Females**	**%**	**Males**	**Females**	**%**	**Males**	**Females**
Aged 16-64	21,200	25.9	28.4	23.5	22.3	21.1	23.5	18.5	17.9	19.2
Aged 25-64	18,800	27.6	30.3	24.7	23.0	21.4	24.7	19.2	18.3	20
Employees & self emp. aged 16-64	21,200	31.8	32.9	30.6	29.3	26.3	32.8	25.2	22.7	28
Managerial & professional.	10,900	36.0	28.8	48.2	35.0	32.0	39.1	31.3	28.2	35.2
Service industries	19,100	35.1	37.6	33.0	31.4	28.8	33.7	26.9	24.6	28.9
Private services	11,300	29.6	31.6	26.9	23.4	23.9	22.6	19.7	20.2	19.1
Public sector	7,800	48.0	83.5	40.4	43.8	43.1	44.1	38.9	38.3	39.2
working full-time	15,900	36.2	30.5	50.1	29.2	25.8	35.8	26.0	23.3	30.8
working part-time	5,300	24.3	53.5	18.7	29.6	31.0	29.3	22.9	18.9	24.2

Source: ONS (2016)

4.57 Training and learning in the work environment is a key driver of raising productivity. Approximately one quarter of Eastleigh's working age population started some job-related training in the last 13 weeks during 2015, and this is higher than the Solent LEP (22.3%) and the national average (18.5%), Table 4.11. Eastleigh has higher rates of training than the UK and the Solent LEP on all metrics shown in Table 4.11 except for working part-time.

4.58 In most cases males in Eastleigh have a higher proportion in training than their female counterparts, and especially so in the public sector or among those working part-time. Females were higher in managerial and professional occupations and working full-time. Job-related training was proportionately higher in the public sector when compared to the private sector.

4.59 Although the economy is growing, and despite relatively high levels of skills, there are skills gaps and skills shortages being reported by employers. Below national and regional geographies the Employer Skills Survey data is only available at the local education authority and LEP level. Table 4.12 highlights skill gaps and skills shortages[28] for the three Hampshire LEAs, Solent LEP and South East.

Table 4.12: Vacancies, Skills and Training in Establishments 2015

% of establishments	Hampshire	Portsmouth	Southampton	Solent LEP	South East
With a vacancy	21	23	25	20	22
Vacancy density*	4	2	3	3	4
With a hard-to-fill vacancy	10	7	9	9	9
Hard-to-fill vacancy density**	28	18	19	21	26
With a skills gap	16	22	16	17	14
% of workforce that have skills gaps	5	4	4	4	5
With a skill-shortage vacancy	7	5	9	6	7
Skill-shortage vacancy density***	16	10	11	11	14
With staff in training over the last 12 months	70	76	67	71	67
Providing online training or e-learning in the last 12 months	49	57	51	49	67

Source: UKCES (2015)
* Vacancy density is calculated as number of vacancies as a proportion of all employment
** Hard-to-fill vacancy density is calculated as number of hard-to-fill vacancies as a proportion of all vacancies
*** Skills shortage vacancy density is calculated as number of skills shortage vacancies as a proportion of all vacancies.

4.60 The two cities have a marginally higher proportion of businesses reporting a vacancy, while the Solent LEP is lowest amongst the comparator areas. This would suggest that other local authorities in the LEP, and feasibly Eastleigh, have a lower vacancy rate.

4.61 Hard to fill vacancies i.e. those vacancies reported in the survey has being harder to fill, are more or less comparable at around one in ten. In terms of internal skills where an employer considers an employee not to be fully proficient in their job it is classed as a skills gap.

4.62 Although subjective, employers will define ‘proficient’ differently, there is a suggestion that between one in five and one in seven businesses believe they have a skills gap, and this has the potential to hit productivity. However, approximately seven out of ten businesses report staff undertaking training in the past 12 months.

[28] Internal skills gaps – staff are not fully proficient to perform their job role; external skills shortages – establishments are having difficulties finding people with the appropriate skills to fill vacancies.

4.63 Online training is less prevalent and more varied, with around half of Hampshire, Southampton and Solent employers providing online training over the past 12 months to just over two thirds across the South East as a whole. Portsmouth employers were in between at 57%.

4.64 The percentage of Eastleigh year 11 pupils gaining 5 or more GSCEs (A*-C) has been consistently above the Hampshire and England averages between 2013 and 2015 (Table 4.13). With 72.7%, Eastleigh has the third highest percentage in Hampshire[29].

Table 4.13: GCSE and equivalent results, percentage of pupils gaining - achieving 5+ A*-C in Eastleigh, Hampshire and England 2013-2015.

	5+ A*-C GCSEs		
	2015%	**2014%**	**2013%**
Areas	**First**	**First**	**Best**
England - State Funded	66.5	65.8	83.1
Hampshire - Published	67.7	67.6	79.0
Basingstoke	61.2	64.0	76.5
East Hants	69.6	75.5	87.7
Eastleigh	**72.7**	**74.7**	**83.2**
Fareham	69.4	68.8	75.2
Gosport	58.0	54.8	82.2
Hart	78.8	76.1	87.3
Havant	60.2	60.2	78.3
New Forest	67.7	66.8	74.0
Rushmoor	55.1	55.6	67.6
Test Valley	68.3	65.7	74.2
Winchester	81.3	76.3	83.9

Source: Hampshire County Council. Note *: There has been a change in examinations for pupils in 2014 where the Department for Education now used the first examination taken rather that the best one for GCSE. For this reason rates are greater in 2013 than 2014 and 2015.

4.65 The Progress 8 is a new type of value added measure that was introduced in 2016 (and 2015 for schools that chose to opt in early), and aims to capture the progress that a pupil makes from the end of primary school to the end of secondary school. Pupils' results are compared to the actual achievements of other pupils with similar prior attainment[30]. The data can be interpreted as any

[29] Please note that 2013 is not comparable to 2014 onwards because of changes in how the exam results are reported.

[30] The Progress 8 measure has been introduced for all schools in 2016. From this point, the floor standard will be based solely on schools' exam results on the Progress 8 measure. For a further

positive value i.e. above zero meaning the school as a whole does on average better at KS4 as those with similar prior attainment nationally. A negative value is below the national average, while zero is in line with the national average.

Table 4.14: Progress 8 score percentages over the national average in Eastleigh, Hampshire and England 2015-2016

HIAS District	Progress 8 Score 2016	Progress 8 Score 2015
England - All State Funded Schools	**-0.03**	**np**
Hampshire LA - Published	**-0.03**	**0.00**
Basingstoke	-0.40	-0.23
East Hants	-0.09	0.07
Eastleigh	**0.13**	**0.14**
Fareham	-0.02	0.03
Gosport	-0.09	-0.15
Hart	0.21	0.18
Havant	-0.06	-0.08
New Forest	0.02	-0.05
Rushmoor	-0.22	-0.15
Test Valley	0.01	0.00
Winchester	0.16	0.25

Source: Hampshire County Council (2016). 'np' – not published.

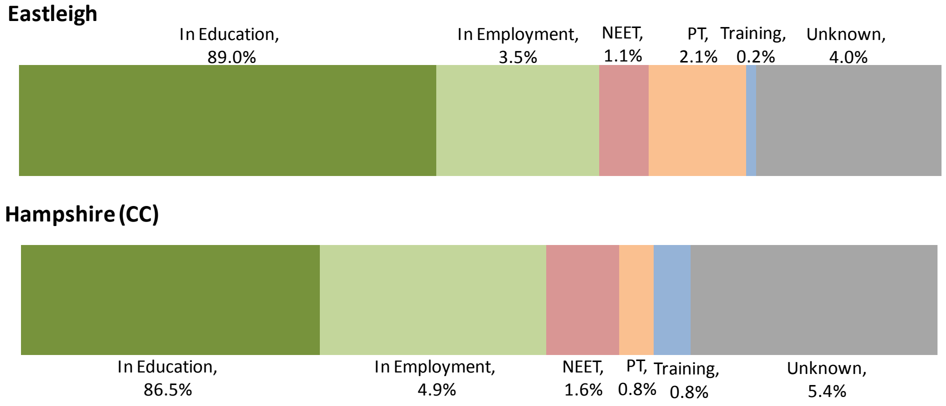
4.66 Table 4.14 looks at Progress 8 scores across the Hampshire districts and all state funded schools in England pupils' performance. Eastleigh schools have collectively performed above the national average in 2015 and 2016. Eastleigh has ranked third best performance in Hampshire over both years, with only Winchester and Hart achieving higher Progress 8 scores. Scores for individual schools can be accessed online from the Department for Education school performance tables, with the six Eastleigh schools in the Appendix.

4.67 Although provisional data, there is the suggestion that school leavers going on to education is proportionately higher in Eastleigh than the Hampshire average. In contrast fewer Eastleigh school leavers go into employment compared to the Hampshire average (Figure 4.13). Part-time activity i.e. a combination of part time study and part time employment is higher in

understanding please see "*Progress 8 and Attainment 8 measure in 2016, 2017, and 2018 Guide for maintained secondary schools, academies and free schools*." DFE (October 2016)

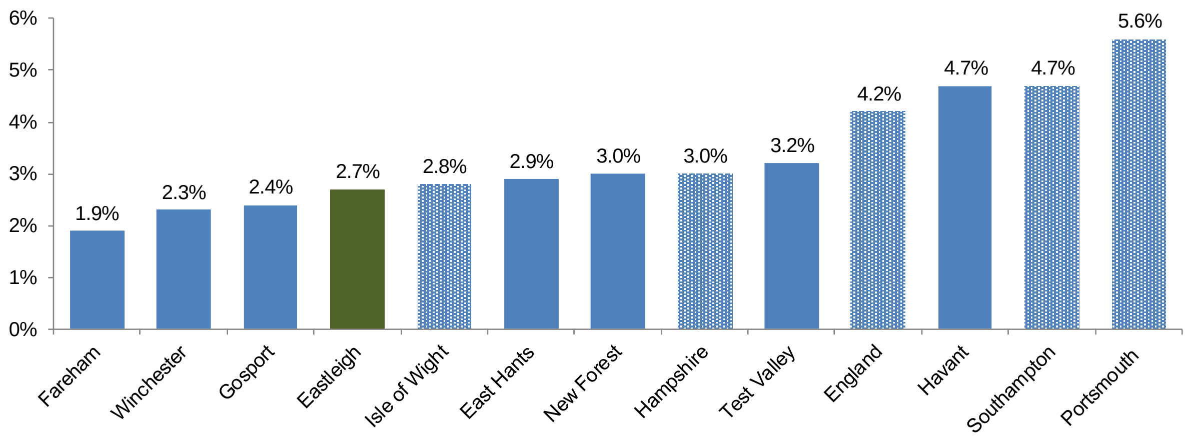
Eastleigh, but the numbers involved are small. Those Not in Education, Employment or Training (NEET) are explored under the NEET data, although it is apparent NEET levels are proportionately lower in Eastleigh.

Figure 4.13: Provisional 2016 Destination of School Leavers



Source: Hampshire County Council (2016). Data extracted from Annual Activity Survey which records the destination of young people who completed year 11 in the summer of 2016. Destinations are as of the 1st of November 2016. Final submission of Activity survey data is not until 2017 and subject to change. PT = part-time activities.

Figure 4.14: Percentage of those Not in Education, Employment or Training (NEET)

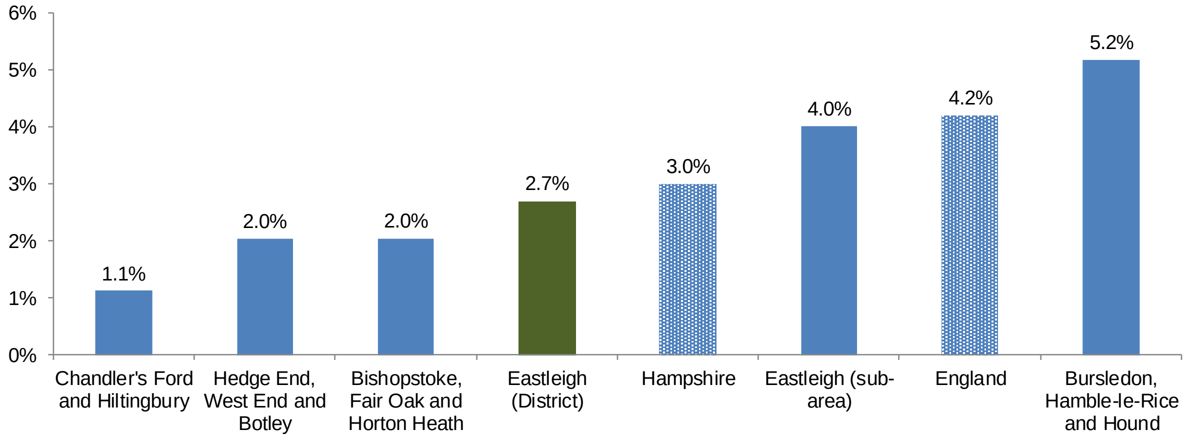


Source: Hampshire County Council (2016). The Isle of Wight, Southampton, Portsmouth and England figures are from the Local Authority Interactive Tool. Adjusted NEET for young people in academic years 16-18 taken as average of November, December and January for 2015-16. District figures are determined by the home postcode of the young person.

4.68 Eastleigh (2.7%) has one of the lowest NEET rates across Hampshire, and is well below the England average and half that of Portsmouth (Figure 4.14). At the sub-area, the lowest NEET rate is in Chandler's Ford and Hiltingbury (1.1%) while Burlesdon, Hamble-le-Rice and Hound sub-area has the highest at 5.2%, and the only sub-area above the national average (Figure 4.15).

While the Eastleigh sub-area (4.0%) is marginally below the national NEET it is above the Eastleigh borough average.

Figure 4.15: Percentage of those Not in Education, Employment or Training (NEET) – Eastleigh Sub-areas



Source: Hampshire County Council (2016). Area and Ward (sub-areas) determined by the home postcode of the young person.

5. Demography and Housing

5.1 Demography

5.1 The demography and housing chapter looks at total population, working age population (16-64yrs), the older population (aged 65yrs+) and recent housing completions.

5.2 In 2015, the population of Eastleigh was estimated at just over 129,000 using the ONS 2015 Mid Year Estimates. The population has grown since 2005 by 0.9% per annum. This has marginally out-paced the UK (0.8%) and the Solent LEP (0.7%), but was in line with the South East average (0.9%). Over the more recent period since the 2011 Census, population growth has been slower at 0.6% per annum.

Table 5.1: Total Population and Average Annual Population Growth

	Total Population			Average Annual Population Growth (%)	
	2005	2011	2015	2005-2015	2011-2015
Eastleigh	118,090	125,200	129,030	0.9	0.6
Bursledon, Hamble-le-Rice and Hound	18,030	18,700	19,150	0.6	0.5
Hedge End, West End and Botley	34,740	36,630	38,300	1.0	0.9
Eastleigh	31,460	34,470	36,450	1.5	1.1
Bishopstoke, Fair Oak and Horton Heath	18,440	18,900	18,530	0.0	-0.4
Chandler's Ford and Hiltingbury	15,420	16,500	16,600	0.7	0.1
Solent LEP	982,510	1,020,290	1,052,120	0.7	0.6
South East	8,202,900	8,634,750	8,947,910	0.9	0.7

Source: ONS (2016). Mid year estimates.

5.2 By sub-area, and accounting for 29.7% of the boroughs total population (38,300 residents) the Hedge End, West End and Botley sub-area has the largest population in 2015, whilst the Chandler's Ford and Hiltingbury sub-area only accounts for 12.9%, the smallest sub-area at only 16,660 residents (Table 5.1). Over the decade the population of the Eastleigh sub area grew fastest at a rate of 1.5% per annum in comparison to all other sub-areas in borough. This was also the case for population growth since 2011, with the Eastleigh sub-area once again showing the fastest growth at 1.1% per annum. In contrast, Bishopstoke, Fair Oak and Horton Heath saw no overall growth over the decade and a small annual decline since 2011 of 0.4% per annum.

5.3 The working age population (those aged between 16 and 64) of Eastleigh in 2015 stood at an estimated 80,400 (Table 5.2). This population sub-group has grown by 0.5% per annum over the decade. This is slower than the South East (0.6%) but faster than Solent LEP (0.4%).

Table 5.2: Population Aged 16-64, Eastleigh and Sub-Areas

		% share of the total population					Average Annual Population Growth (%)	
	2005	%	2011	%	2015	%	2005-2015	2011-2015
Eastleigh	76,680	64.9	80,650	64.4	80,440	62.3	0.5	-0.1
Bursledon, Hamble-le-Rice and Hound	11,620	64.4	12,030	64.3	11,890	62.1	0.2	-0.2
Hedge End, West End and Botley	22,710	65.4	23,530	64.2	23,630	61.7	0.4	0.1
Eastleigh*	20,930	66.5	23,160	67.2	23,800	65.3	1.3	0.5
Bishopstoke, Fair Oak and Horton Heath	11,890	64.5	12,110	64.1	11,650	62.9	-0.2	-0.8
Chandler's Ford and Hiltingbury	9,530	61.8	9,820	59.5	9,470	57.0	-0.1	-0.7
Solent LEP	711,380	72.4	734,660	72.0	740,850	70.4	0.4	0.2
South East	5,266,300	64.2	5,510,650	63.8	5,563,810	62.2	0.6	0.2
UK	39,111,210	64.7	40,930,270	64.8	41,241,000	63.3	0.5	0.2

Source: ONS (2016).Mid year estimates.

5.4 Since 2011 the working age population of Eastleigh has declined marginally by -0.1% per annum compared to a small growth of 0.2% across the Solent LEP. As a share of the total population the working age group accounts for 62.3% in 2015, which is below the Solent LEP proportion (70.4%).

5.5 Across the five sub Areas the Eastleigh sub-area had the largest population of working age individuals (23,800), and followed closely by Hedge End, West End and Botley sub-area (23,630). The highest growth rate over the decade was also observed in Eastleigh at 1.3% per annum, whilst the working age population declined by -0.2% in Bishopstoke, Fair Oak and Horton Heath and by -0.1% in Chandler’s Ford and Hiltingbury.

5.6 Since 2011, the Eastleigh and Hedge End, West End and Botley were the only sub-areas to experience growth since 2001 at 0.5% and 0.1%

respectively. In contrast, the working age populations declined across the other three sub-areas. Bishopstoke, Fair Oak and Horton Heath sub-area declined by -0.8% per annum, Chandler's Ford and Hiltingbury sub-area by -0.7% and Bursledon, Hamble-le-Rice and Hound sub-area by -0.2%. As a proportion of the total population in 2015, the Chandlers Ford and Hiltingbury sub-area had by far the smallest relative working age population (57.0%).

5.7 In Eastleigh the population aged 65 and over stood at approximately 24,000 in 2015. The older population has grown rapidly since 2005 and is up by 2.8% per annum. This is faster than UK (1.9%), South East (2.2%) and Solent LEP averages (1.8%). Since 2011 the pace of growth has increased to 2.9% per annum, and outpacing the three comparator areas of the UK, the South East and the Solent LEP.

5.8 In 2005 Eastleigh's older population accounted for 15.5% of the borough population, increasing to 16.6% in 2011 and 18.6% in 2015. The 2015 figure is in line with the older Solent LEPs population which accounted for 18.5% of its total population.

Table 5.3 – Population Aged 65+, Eastleigh and Sub-Areas

	% share of the total population						Average Annual Population Growth (%)	
	2005	%	2011	%	2015	%	2005-2015	2011-2015
Eastleigh	18,260	15.5	20,840	16.6	24,010	18.6	2.8	2.9
Bursledon, Hamble-le-Rice and Hound	2,890	16.0	3,240	17.3	3,760	19.6	2.7	3.0
Hedge End, West End and Botley	5,170	14.9	6,120	16.7	7,150	18.7	3.3	3.2
Eastleigh*	4,360	13.9	4,710	13.7	5,480	15.0	2.3	3.1
Bishopstoke, Fair Oak and Horton Heath	2,640	14.3	3,050	16.1	3,510	18.9	2.9	2.8
Chandler's Ford and Hiltingbury	3,200	20.8	3,720	22.5	4,110	24.8	2.5	2.0
Solent LEP	162,660	16.6	174,280	17.1	194,200	18.5	1.8	2.2
South East	1,347,740	16.4	1,482,020	17.2	1,679,600	18.8	2.2	2.5
UK	9,614,950	15.9	10,400,000	16.5	11,611,200	17.8	1.9	2.2

Source: ONS (2016). Mid-year estimates.

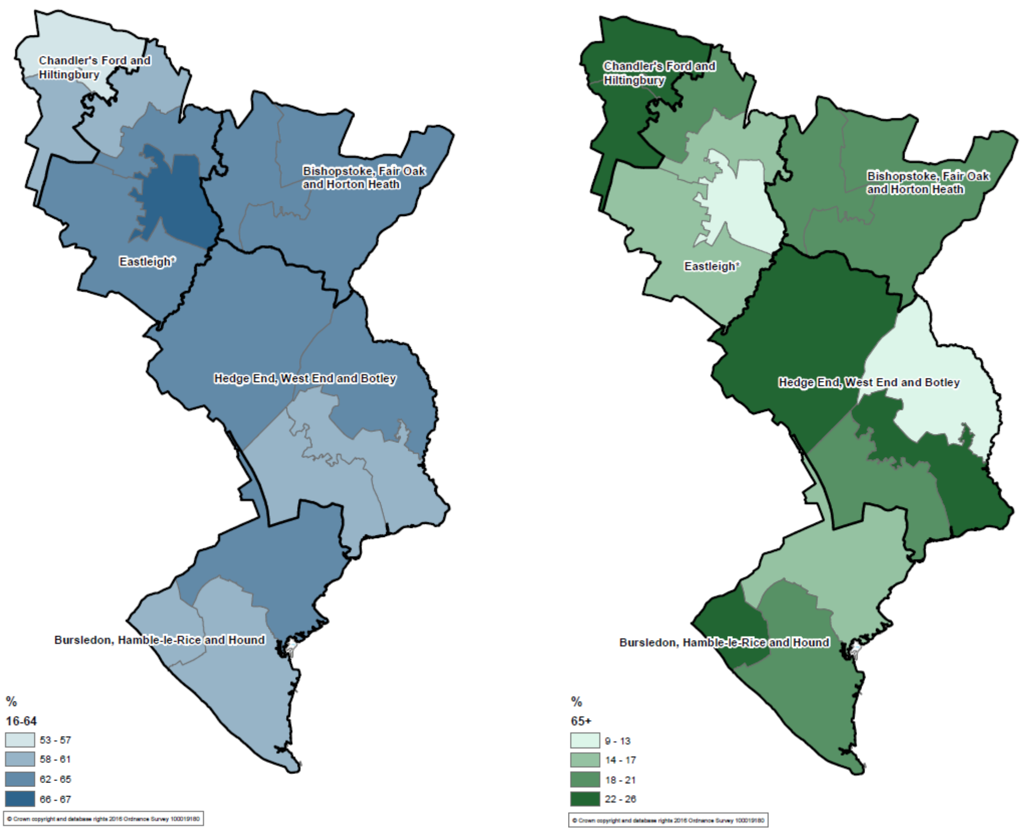
5.9 At the sub-area level in 2015, the Hedge End, West End and Botley sub-area had the largest population aged 65 and over with 7,150 residents (Table 5.3).

As a proportion of the population the Chandler's Ford and Hiltingbury sub-area has almost 1 in 4 residents aged 65+ (24.8%). In all of Eastleigh's five sub-areas the growth in the over 65s has been strong since 2005, however, the elderly population in the Hedge End, West End and Botley sub-area has grown the fastest at 3.3% per annum. Since 2011, the pace of growth has increased in the Eastleigh and Bursledon, Hamble-le-Rice and Hound sub-areas by 3.1% and 3.0% per annum respectively. This follows similar trends in the UK, South East and Solent LEP figures where the pace of growth in the elderly population has also increased.

5.10 Figure 5.1 show the spatial distribution of the working age and elderly populations of Eastleigh as a proportion of the total population.

Figure 5.1 – Population Aged 16-64 and 65+, Eastleigh and Sub-Areas, MSOA Level MYE, 2015

Working Age **Elderly**

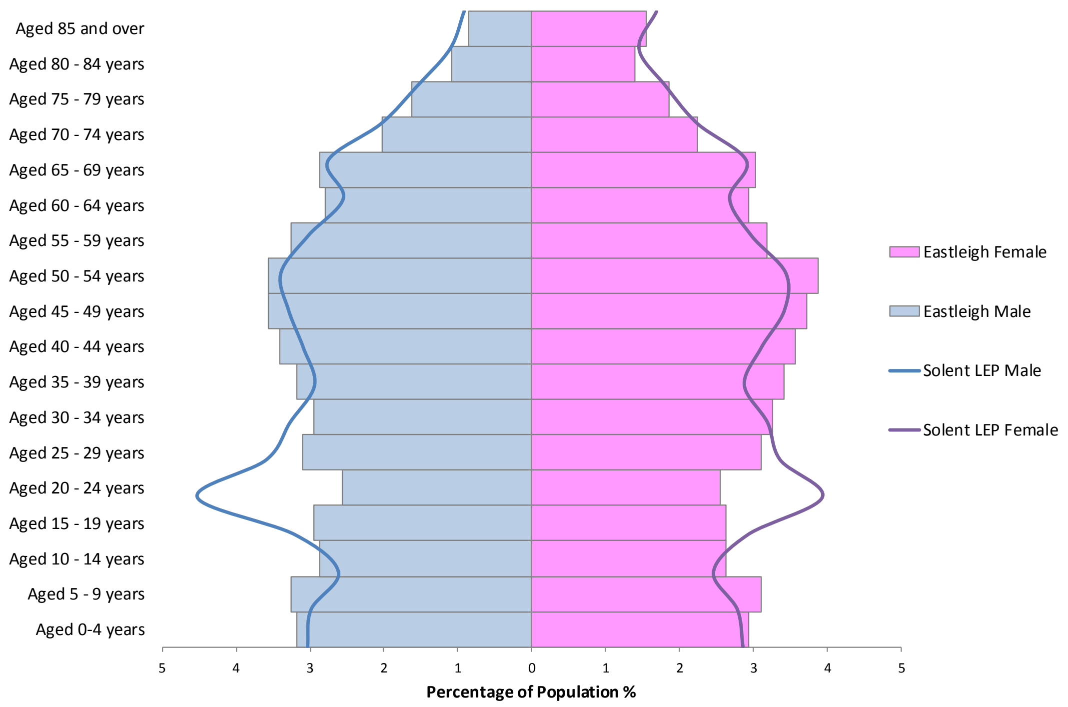


Source: ONS (2016)

5.11 The following three figures provide population pyramids showing the age and sex structure of Eastleigh Borough's population and how it compares to the Solent LEP as a whole and five sub areas.

5.12 Similarities across all pyramids include the larger older female populations compared to males, with greater proportions surviving to the very oldest age groups. Also evident on all pyramids are the baby boom generations of the post second world war (now in their late sixties) and those born during the 1960's boom (now in their late forties and early fifties).

Figure 5.2: Population Pyramid - Eastleigh and Solent LEP, MYE, 2015



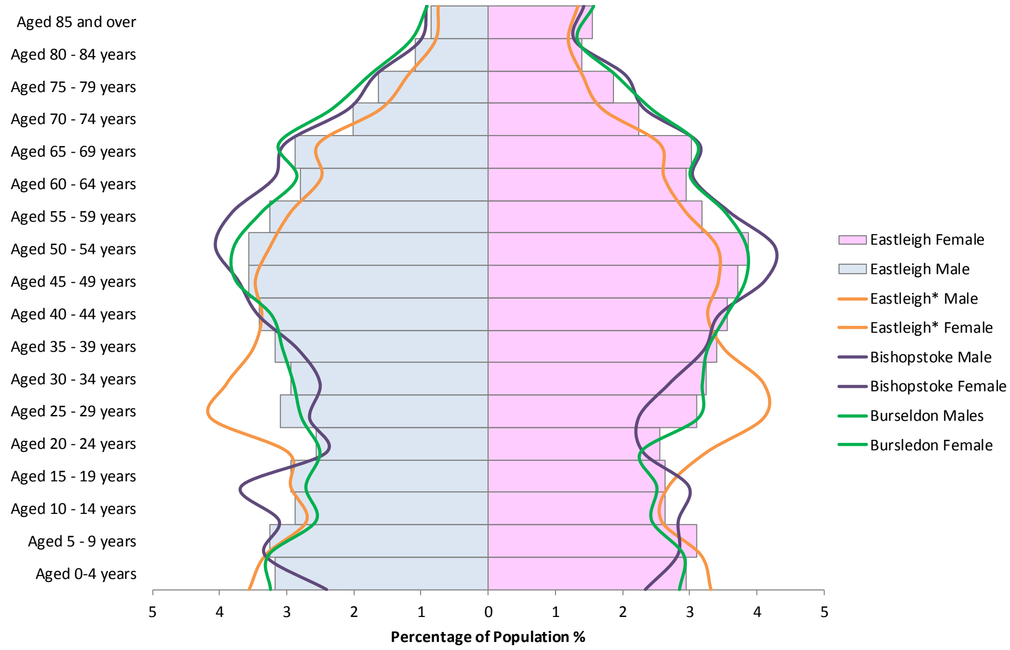
Source: ONS (2016) .Mid Year Estimates Eastleigh is represented throughout as pyramid bars whilst comparator areas are shown as line overlays

5.13 Focusing on Figure 5.2, the pyramids indicate that Eastleigh has a relatively older population when compared to the Solent LEP. Eastleigh has a relatively smaller child and young adult population, but a larger older working age population when compared to the Solent LEP's population. The much larger 15-24 year old population within the Solent LEP is largely explained by the student populations of Portsmouth and Southampton.

5.14 When looking at Eastleigh's sub areas there are significant differences in their age and sex structures. The Eastleigh sub-area for example has a much younger population than Eastleigh Borough as a whole, but this also the case when the sub-area is compared to the Bursledon, Hamble-le-Rice, Hound and Bishopstoke, Fair Oak, Horton Heath sub-areas (Figure 5.3). In contrast, the

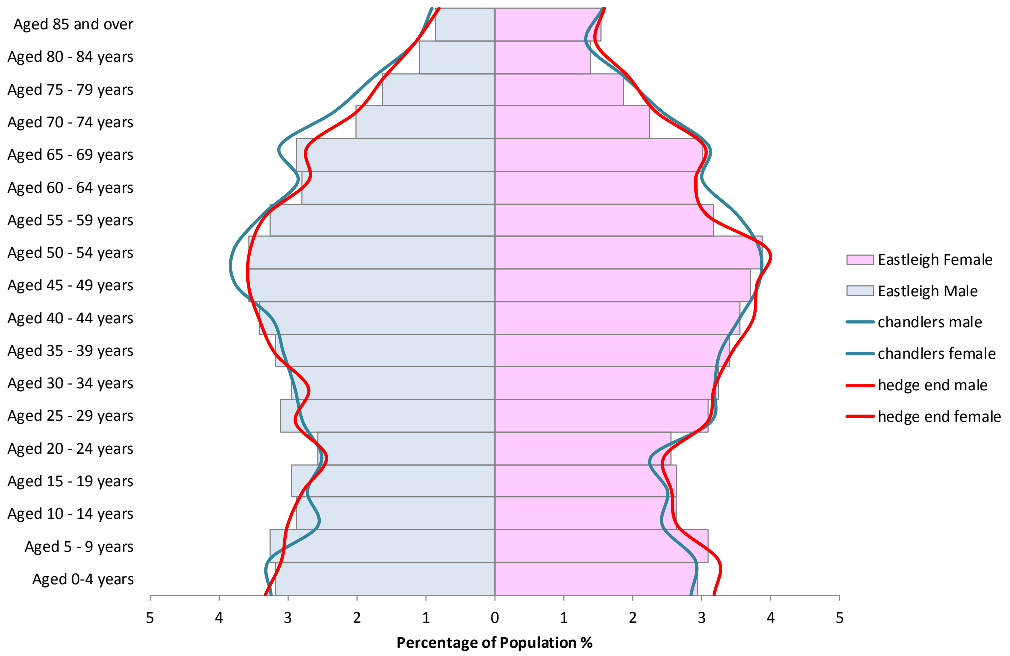
Bursledon, Hamble-le-Rice, Hound and Bishopstoke, Fair Oak, Horton Heath sub-areas have older populations.

Figure 5.3: Population Pyramid - Eastleigh Borough versus Eastleigh sub-area, Bursledon, Hamble-le-Rice, Hound sub-area and Bishopstoke, Fair Oak, Horton Heath sub-area



Source: ONS (2016) Mid Year Estimates *Eastleigh sub-area

Figure 5.4: Population Pyramid, Eastleigh Borough versus the Chandlers Ford and Hiltingbury and Hedge End, West End and Botley sub-areas



Source: ONS (2016). Mid-Year Estimates.

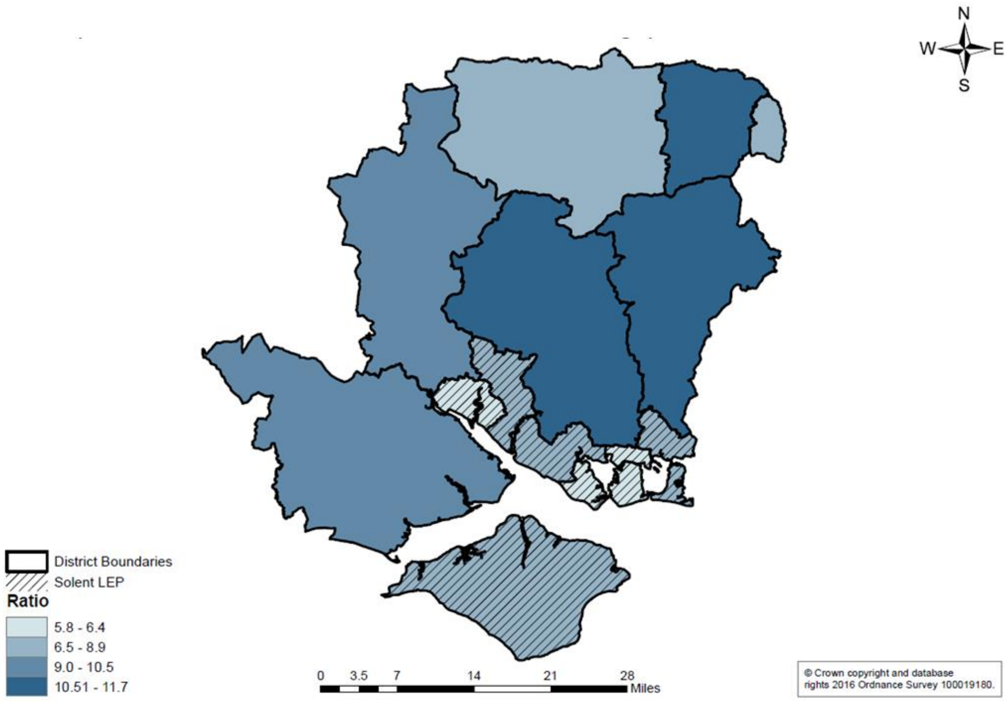
5.15 The two final sub areas of Hedge End, West End, Botley and Chandler's Ford and Hiltingbury are more similar to Eastleigh Borough as a whole, particularly so the Hedge End, West End and Botley sub-area which has the greatest differences seen for children and young adult age groups (Figure 5.4).

5.2 Housing

5.16 The median price per house sold in Eastleigh in the first quarter of 2016 was 248,000, which is approximately £33,000 more expensive than for England as a whole, yet £31,000 lower in comparison to the South East Region[31].This median house price is equivalent to almost nine times the median annual salary in the borough (8.7), while the ratio in England stands at 7.6[32].

5.18 Eastleigh is bordered by one of the lowest house price to earnings ratio in Southampton (6.4), but equally is also bordered by the least affordable district across the entire area in Winchester (11.7). In the Solent LEP area, only Fareham is shown to be less affordable than Eastleigh (8.9), while all other districts are lower. Gosport has the lowest ratio with 5.8 – Figure 5.5.

Figure 5.5: Ratio of Median Sale Price: Median Annual Earnings 2015

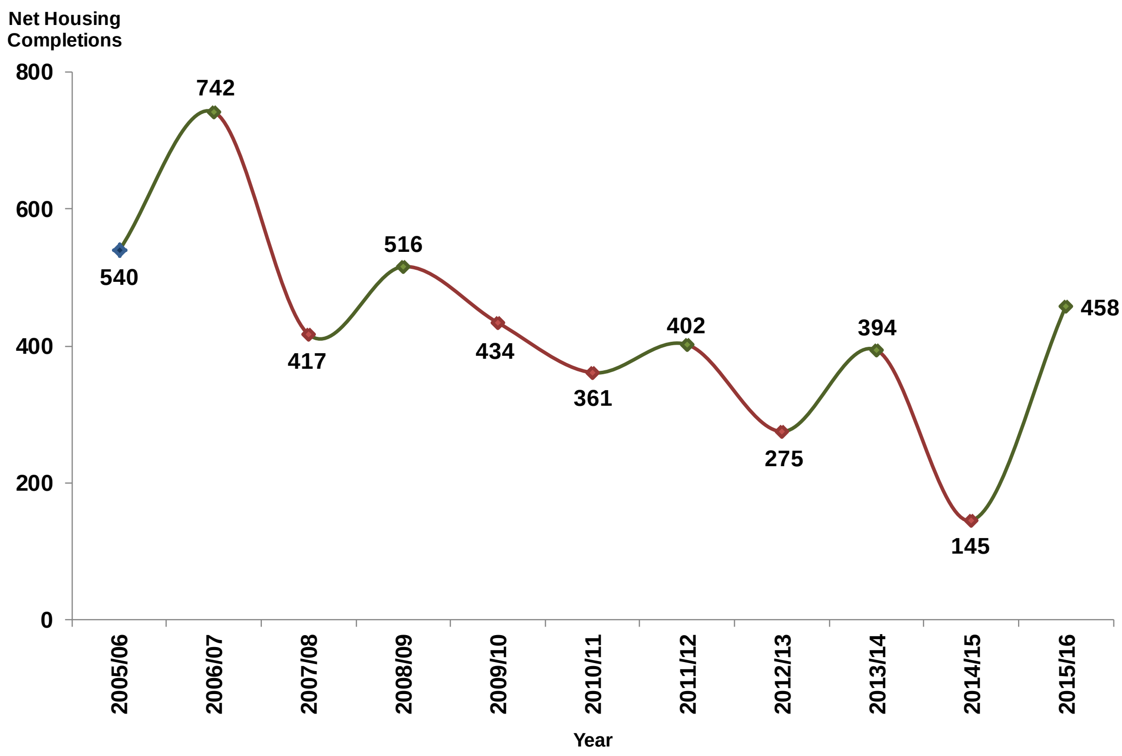


Source: ONS (2016)

[31] Office for National Statistics, Median House Price for National and Subnational Geographies, Table 2a (Median price paid by local authority), Updated September 2016
[32] Communities and Local Government, Live Tables, Table 577 – Ratio of median house price to median earnings by LA, 2015.

5.19 The number of net housing completions for Eastleigh (gross gains in housing units minus the number of demolitions and losses to other uses) are shown in Figure 5.6. In 2015/16 this figure stood at 458, the highest since 2008/09. The low figure of 145 net completions in the previous year 2014/15 was in part due to a high number of demolitions being recorded (149); the majority of this being part of a regeneration scheme.

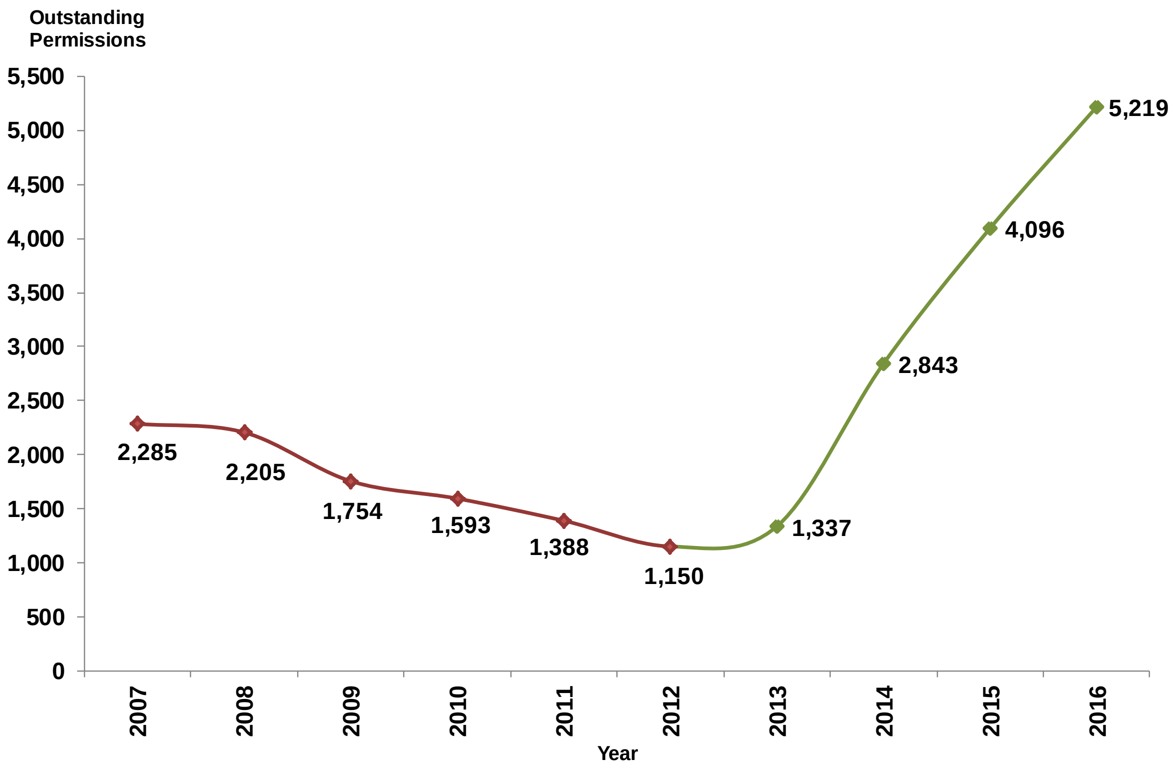
Figure 5.6 – Net Housing Completions between 2005/06 and 2015/16



Source: Hampshire County Council (2016)

5.20 Figure 5.7 below shows the number of outstanding housing permissions across Eastleigh. Between 2007 and 2012 the number of outstanding permissions declined from 2,285 to a low of 1,150. Since 2012, the number of outstanding permissions has increased year on year, reaching peaks of 4,096 in 2015 and 5,219 in 2016. Between 2012 and 2016, outstanding housing permissions rose by over 4.5 times.

Figure 5.7 – Net Outstanding Housing Permissions between 2007 and 2016



Source: Hampshire County Council (2016)

Appendices

Appendix 1: Definitions

Geographic Definitions

Table A1.1: Eastleigh Borough Council Sub-area definition

Eastleigh Sub-area	2015 Ward
Bishopstoke, Fair Oak and Horton Heath	Bishopstoke East Bishopstoke West Fair Oak and Horton Heath
Hedge End, West End and Botley	Hedge End Grange Park Hedge End St John's Hedge End Wildern West End North West End South Botley
Bursledon, Hamble-le-Rice and Hound	Bursledon and Old Netley Hamble-le-Rice and Butlocks Heath Netley Abbey
Chandler's Ford and Hiltingbury	Chandler's Ford East Chandler's Ford West Hiltingbury East Hiltingbury West
Eastleigh	Eastleigh Central Eastleigh North Eastleigh South

Table A1.2: 2011 Middle Super Output Area Best fit Sub-area Definition

Sub-area	MSOA Name	MSOA Code
Bishopstoke, Fair Oak and Horton Heath	Eastleigh 005 Eastleigh 008	E02004716 E02004719
Bursledon, Hamble-le-Rice and Hound	Eastleigh 013 Eastleigh 014 Eastleigh 015	E02004724 E02004725 E02004726
Chandler's Ford and Hiltingbury	Eastleigh 001 Eastleigh 003	E02004712 E02004714
Eastleigh	Eastleigh 002* Eastleigh 004** Eastleigh 006 Eastleigh 007	E02004713* E02004715** E02004717 E02004718
Hedge End, West End and Botley	Eastleigh 009 Eastleigh 010 Eastleigh 011 Eastleigh 012	E02004720 E02004721 E02004722 E02004723

***** Eastleigh 002 small part in Hiltingbury East and Chandler's Ford East wards, but mostly in Eastleigh North Ward and allocated to Eastleigh sub-area. **Eastleigh 004 small part in Bishopstoke West Ward, but mostly in Eastleigh North Ward and allocated to Eastleigh sub-area.

Sector Definitions

Financial & Professional Services

Finance
6411: Central banking
6419: Other monetary intermediation
6430: Trusts, funds and similar financial entities
6491: Financial leasing
6492: Other credit granting
6499: Other financial service activities, except insurance and pension funding, n.e.c.
6511: Life insurance
6512: Non-life insurance
6520: Reinsurance
6530: Pension funding
6611: Administration of financial markets
6612: Security and commodity contracts brokerage
6619: Other activities auxiliary to financial services, except insurance and pension funding
6621: Risk and damage evaluation
6622: Activities of insurance agents and brokers
6629: Other activities auxiliary to insurance and pension funding
6630: Fund management activities
Professional Services
6910: Legal activities
6920: Accounting, bookkeeping and auditing activities; tax consultancy
7021: Public relations and communication activities
7022: Business and other management consultancy activities
7111: Architectural activities
7220: Research and experimental development on social sciences and humanities
7311: Advertising agencies
7320: Market research and public opinion polling
7430: Translation and interpretation activities
7490: Other professional, scientific and technical activities n.e.c.

Advanced Engineering

2016: Manufacture of plastics in primary forms
2017: Manufacture of synthetic rubber in primary forms
2060: Manufacture of man-made fibres
2314: Manufacture of glass fibres
2320: Manufacture of refractory products
2433: Cold forming or folding
2511: Manufacture of metal structures and parts of structures
2550: Forging, pressing, stamping and roll-forming of metal; powder metallurgy
2561: Treatment and coating of metals
2562: Machining
2611: Manufacture of electronic components
2651: Manufacture of instruments and appliances for measuring, testing and navigation
2670: Manufacture of optical instruments and photographic equipment
2711: Manufacture of electric motors, generators and transformers
2720: Manufacture of batteries and accumulators
2732: Manufacture of other electronic and electric wires and cables
2733: Manufacture of wiring devices
2740: Manufacture of electric lighting equipment
2790: Manufacture of other electrical equipment
2811: Manufacture of engines and turbines, except aircraft, vehicle and cycle engines
2812: Manufacture of fluid power equipment
2813: Manufacture of other pumps and compressors
2815: Manufacture of bearings, gears, gearing and driving elements
2822: Manufacture of lifting and handling equipment
2825: Manufacture of non-domestic cooling and ventilation equipment

2829: Manufacture of other general-purpose machinery n.e.c.
2910: Manufacture of motor vehicles
2920: Manufacture of bodies (coachwork) for motor vehicles; manufacture of trailers and semi-trailers
2931: Manufacture of electrical and electronic equipment for motor vehicles
2932: Manufacture of other parts and accessories for motor vehicles
3020: Manufacture of railway locomotives and rolling stock
3091: Manufacture of motorcycles
3099: Manufacture of other transport equipment n.e.c.
3312: Repair of machinery
3314: Repair of electrical equipment
3317: Repair and maintenance of transport equipment n.e.c.
7112: Engineering activities and related technical consultancy
7120: Technical testing and analysis

Construction

41.10: Development of building projects
41.20: Construction of residential and non-residential buildings
42.11: Construction of roads and motorways
42.12: Construction of railways and underground railways
42.13: Construction of bridges and tunnels
42.21: Construction of utility projects for fluids
42.22: Construction of utility projects for electricity and telecommunications
42.91: Construction of water projects
42.99: Construction of other civil engineering projects n.e.c.
43.11: Demolition
43.12: Site preparation
43.13: Test drilling and boring
43.21: Electrical installation
43.22: Plumbing, heat and air-conditioning installation
43.29: Other construction installation
43.31: Plastering
43.32: Joinery installation
43.33: Floor and wall covering
43.34: Painting and glazing
43.39: Other building completion and finishing
43.91: Roofing activities
43.99: Other specialised construction activities n.e.c.

Retail

47.11: Retail sale in non-specialised stores with food, beverages or tobacco predominating
47.19: Other retail sale in non-specialised stores
47.21: Retail sale of fruit and vegetables in specialised stores
47.22: Retail sale of meat and meat products in specialised stores
47.23: Retail sale of fish, crustaceans and molluscs in specialised stores
47.24: Retail sale of bread, cakes, flour confectionery and sugar confectionery in specialised stores
47.25: Retail sale of beverages in specialised stores
47.26: Retail sale of tobacco products in specialised stores
47.29: Other retail sale of food in specialised stores
47.30: Retail sale of automotive fuel in specialised stores
47.41: Retail sale of computers, peripheral units and software in specialised stores
47.42: Retail sale of telecommunications equipment in specialised stores
47.43: Retail sale of audio and video equipment in specialised stores
47.51: Retail sale of textiles in specialised stores
47.52: Retail sale of hardware, paints and glass in specialised stores
47.53: Retail sale of carpets, rugs, wall and floor coverings in specialised stores
47.54: Retail sale of electrical household appliances in specialised stores
47.59: Retail sale of furniture, lighting equipment and other household articles in specialised stores
47.61: Retail sale of books in specialised stores
47.62: Retail sale of newspapers and stationery in specialised stores
47.63: Retail sale of music and video recordings in specialised stores

47.64: Retail sale of sporting equipment in specialised stores
47.65: Retail sale of games and toys in specialised stores
47.71: Retail sale of clothing in specialised stores
47.72: Retail sale of footwear and leather goods in specialised stores
47.73: Dispensing chemist in specialised stores
47.74: Retail sale of medical and orthopaedic goods in specialised stores
47.75: Retail sale of cosmetic and toilet articles in specialised stores
47.76: Retail sale of flowers, plants, seeds, fertilisers, pet animals and pet food in specialised stores
47.77: Retail sale of watches and jewellery in specialised stores
47.78: Other retail sale of new goods in specialised stores
47.79: Retail sale of second-hand goods in stores
47.81: Retail sale via stalls and markets of food, beverages and tobacco products
47.82: Retail sale via stalls and markets of textiles, clothing and footwear
47.89: Retail sale via stalls and markets of other goods
47.91: Retail sale via mail order houses or via Internet
47.99: Other retail sale not in stores, stalls or markets

Appendix 2: Economic Prosperity

Table A2.1: Nominal GVA by broad industrial sector, £ million

Broad industry	SIC 2007	1997	2007	2010	2014
Agriculture, forestry and fishing	A	10	10	5	8
Production other than manufacturing	BDE	9	24	42	32
Manufacturing	C	339	351	369	422
Construction	F	121	252	254	298
Distribution; transport; accommodation and food	GHI	345	605	616	651
Information and communication	J	64	176	252	341
Financial and insurance activities	K	120	267	266	284
Real estate activities	L	121	233	274	369
Business service activities	MN	208	459	445	519
Public administration; education; health	OPQ	244	367	436	412
Other services and household activities	RST	56	120	131	119
Total	A-T	1,636	2,863	3,091	3,455

Source: ONS (2016)

Table A2.2: Eastleigh's share of the economy of Solent[33], £ million

Broad sector	SIC 2007	1997	2007	2010	2014
Agriculture, forestry and fishing	A	26.8	28.4	10.4	13.4
Production other than manufacturing	BDE	2.9	5.0	7.9	4.8
Manufacturing	C	13.8	14.8	15.2	14.0
Construction	F	17.5	18.2	19.8	19.8
Distribution; transport; accommodation and food	GHI	14.0	15.4	15.5	14.0
Information and communication	J	13.3	15.4	17.3	22.0
Financial and insurance activities	K	15.9	19.9	22.6	24.6
Real estate activities	L	13.6	13.2	13.3	14.2
Business service activities	MN	15.1	17.8	18.5	18.2
Public administration; education; health	OPQ	8.3	8.4	8.9	8.2
Other services and household activities	RST	13.1	15.0	14.7	13.6
Total	A-T	12.8	14.2	14.6	14.4

Source: ONS (2016)

[33] Solent total is based on apportioned district level data and not the sum of the 11 districts in the area

Table A2.3: GVA per head – selected areas, £

Area	1997	2007	2010	2014
East Hampshire	12,300	19,600	22,400	23,500
Fareham	13,100	21,200	22,000	24,200
Gosport	8,400	12,600	13,500	15,100
Havant	12,700	19,100	20,100	23,500
Isle of Wight	8,700	14,100	15,200	17,300
New Forest	11,300	19,300	21,300	23,800
Portsmouth	15,800	23,000	25,000	25,700
Southampton	16,600	23,300	21,100	23,600
Test Valley	14,300	21,500	24,700	28,300
Winchester	17,600	28,600	32,400	37,400
Eastleigh	14,700	23,700	24,900	26,800
Solent	13,600	20,400	20,900	22,900
UK	13,300	21,300	21,800	24,600

Source: HCC (2016) derived from ONS 2016 data

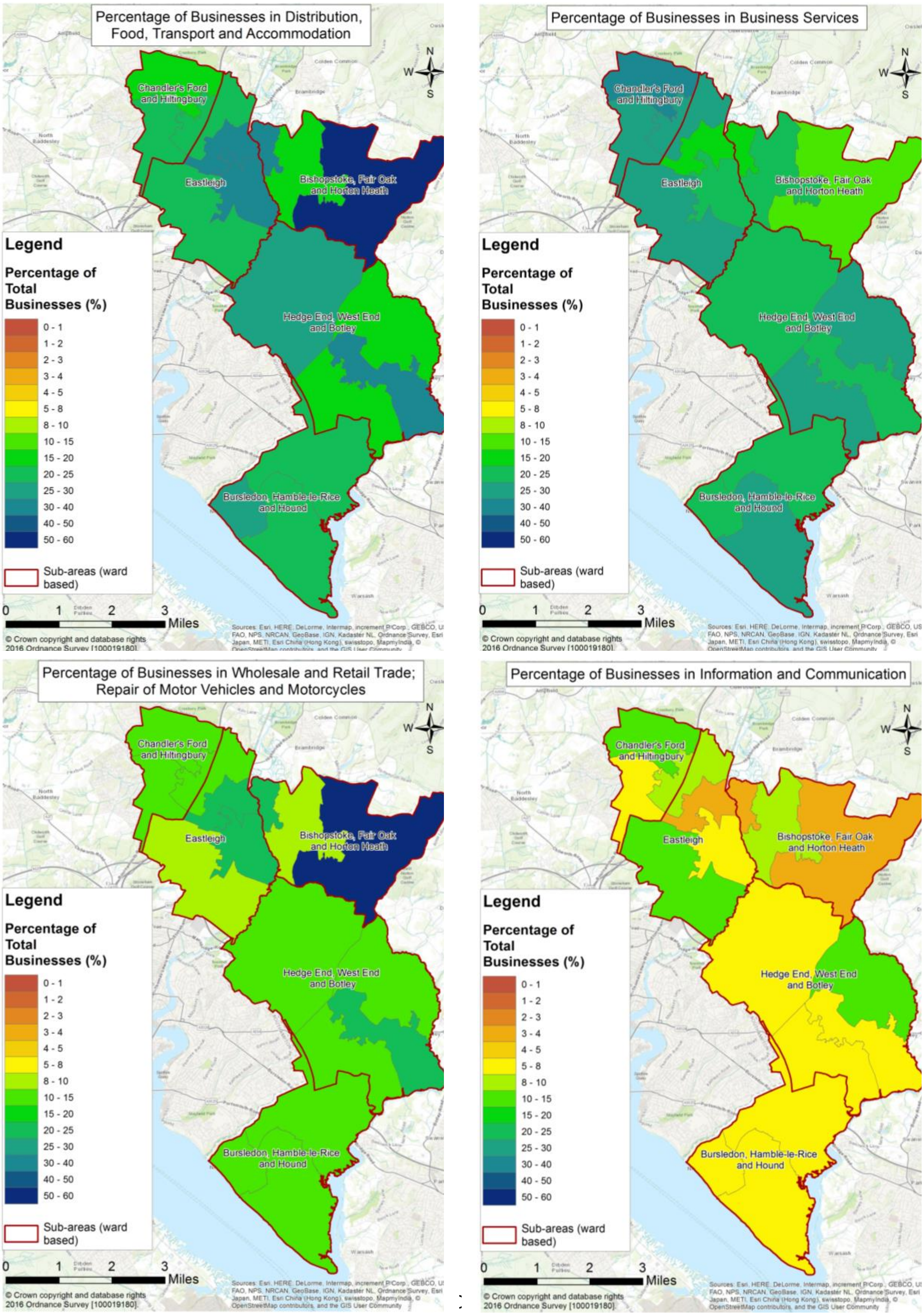
Table A2.3: GVA per head index – selected areas, UK=100

Area	1997	2007	2010	2014
East Hampshire	92.7	92.0	102.6	95.3
Fareham	98.3	99.9	100.9	98.2
Gosport	62.8	59.3	61.9	61.4
Havant	95.7	90.0	91.9	95.6
Isle of Wight	65.2	66.1	69.6	70.2
New Forest	84.5	90.6	97.3	96.5
Portsmouth	118.9	108.1	114.5	104.5
Southampton	124.8	109.8	96.8	95.8
Test Valley	107.1	101.2	113.3	114.9
Winchester	132.1	134.4	148.3	152.0
Eastleigh	110.7	111.7	113.9	108.9
Solent	102.2	96.0	95.8	93.2
UK	100.0	100.0	100.0	100.0

Source: HCC (2016) derived from ONS 2016 data

Appendix 3: Enterprises

Figure 3.1: Spatial Distribution of Businesses by Dominant Industry Sectors 2016



Source: ONS (2016)

Appendix 4: Labour Market

Table A4.1: Resident Main method of Travel to Work 2011

	Bishop-stoke, Fair Oak and Horton Heath		Bursledon, Hamble-le-Rice and Hound		Chandlers Ford and Hiltingbury		Eastleigh		Hedge End, West End and Botley		Eastleigh Borough	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Driving a car or van	7,557	70.8	6,420	66.7	7,347	68.9	9,234	60.7	14,019	71.6	44,577	67.8
Work mainly at or from home	995	9.3	1,064	11.0	1,161	10.9	1,911	12.6	1,926	9.8	7,057	10.7
On foot	523	4.9	555	5.8	634	5.9	1,052	6.9	947	4.8	3,711	5.6
Passenger in a car or van	518	4.9	437	4.5	459	4.3	938	6.2	916	4.7	3,268	5.0
Train	335	3.1	356	3.7	329	3.1	872	5.7	589	3.0	2,481	3.8
Bus, minibus or coach	317	3.0	298	3.1	321	3.0	538	3.5	519	2.6	1,993	3.0
Bicycle	234	2.2	278	2.9	255	2.4	396	2.6	340	1.7	1,503	2.3
Motorcycle, scooter or moped	132	1.2	114	1.2	97	0.9	166	1.1	204	1.0	713	1.1
Other method of travel to work	43	0.4	90	0.9	41	0.4	45	0.3	84	0.4	303	0.5
Taxi	17	0.2	11	0.1	14	0.1	43	0.3	30	0.2	115	0.2
Underground, metro, light rail, tram	3	0.0	7	0.1	13	0.1	13	0.1	11	0.1	47	0.1
Total	10,674	100	9,630	100	10,671	100	15,208	100	19,585	100	65,768	100

Source: ONS (Census 2011).

Table A4.2: Sub-Area Main Method of Travel to Work Change in Proportions 2001-2011

	Bishopstoke, Fair Oak and Horton Heath	Bursledon, Hamble-le-Rice and Hound	Chandlers Ford and Hiltingbury	Eastleigh Sub-area	Hedge End, West End and Botley	Eastleigh Borough
Driving a car or van	1.9	1.1	-0.6	2.3	0.8	0.5
Work mainly at or from home	0.8	1.8	1.3	-0.9	1.0	1.3
On foot	-0.2	-0.3	-0.2	0.2	0.2	0.0
Passenger in a car or van	-1.3	-1.4	-0.9	2.2	-1.1	-1.1
Train	0.8	-1.5	1.6	-1.1	0.8	1.2
Bus, minibus or coach	-1.2	0.7	-0.7	-1.1	-1.2	-1.1
Bicycle	0.1	-0.3	-0.3	-0.9	0.0	-0.3
Motorcycle, scooter or moped	-1.0	-0.2	-0.2	-0.9	-0.4	-0.5
Other method of travel to work	0.1	0.1	0.1	0.0	0.0	0.0
Taxi	0.0	-0.1	0.0	0.1	0.0	0.0
Underground,	0.0	0.0	0.1	0.0	0.0	0.0

Source: ONS (Census 2001-2011)

Table A4.3: Households with One of More Cars and Change 2001-2011

	Households with One or more cars 2011	Households with One or more cars 2001	Percentage Change 2001-2011	Absolute change 2001-2011
Bishopstoke, Fair Oak and Horton Heath	7,178	6,689	7.3	489
Bursledon, Hamble-le-Rice and Hound	7,055	6,296	12.1	759
Chandlers Ford and Hiltingbury	8,015	7,282	10.1	733
Eastleigh	9,338	7,390	26.4	1,948
Hedge End, West End and Botley	13,663	12,515	9.2	1,148
Eastleigh Borough	45,249	40,172	12.6	5,077

Source: ONS (Census 2001-2011)

Table A4.4: Commuter Flow Profiles

	Bishopstoke, Fair Oak and Horton Heath	Bursledon, Hamble-le-Rice and Hound	Chandler's Ford and Hiltingbury	Eastleigh	Hedge End, West End and Botley
Resident Workforce	**10,037**	**9,658**	**8,169**	**18,490**	**19,658**
Live and Work Locally	1,594	2,600	1,884	5,725	5,012
No Fixed Place	947	844	607	1,519	1,651
Out-commute	7,496	6,214	5,678	11,246	12,995
Self-containment	0.25	0.36	0.30	0.39	0.34
Workplace Workforce	**3,792**	**9,703**	**10,802**	**24,587**	**15,617**
Live and Work Locally	1,594	2,600	1,884	5,725	5,012
No Fixed Place	947	844	607	1,519	1,651
In-commute	1,251	6,259	8,311	17,343	8,954
Self-containment	0.67	0.35	0.23	0.29	0.43
Net flow (minus = outflow)	**-6,245**	**45**	**2,633**	**6,097**	**-4,041**

Source: ONS Census 2011 Origin-Destinations.

Table A4.5: Origin-Destination within Eastleigh Sub-areas

In-commuting (Origin) ➔ / Out-commuting (destination) ➔	Bishopstoke, Fair Oak and Horton Heath	Bursledon, Hamble-le-Rice and Hound	Chandler's Ford and Hiltingbury	Eastleigh	Hedge End, West End and Botley
Bishopstoke, Fair Oak and Horton Heath		38	38	210	178
Bursledon, Hamble-le-Rice and Hound	131		91	213	583
Chandler's Ford and Hiltingbury	409	177		1,343	463
Eastleigh	1,500	416	921		1,279
Hedge End, West End and Botley	488	491	169	515	

Source: ONS (Census 2011). Read horizontally ➔ for in-commuting and vertically ➔for out-commuting. For example, 38 residents in-commuted to Bishopstoke, Fair Oak and Horton Heath from Burlesdon, Hamble-Rice and Hound, or 38 residents out-commuted from Burlesdon, Hamble-Rice and Hound to Bishopstoke, Fair Oak and Horton Heath

Table A4.6a: Top Five Destinations of Eastleigh Sub-area Out-commuters (Outside of Eastleigh)

Sub-area	1st	2nd	3rd	4th	5th
Bishopstoke, Fair Oak and Horton Heath	Winchester	Southampton	Test Valley	Fareham	New Forest
Bursledon, Hamble-le-Rice and Hound	Southampton	Winchester	Fareham	Portsmouth	New Forest
Chandler's Ford and Hiltingbury	Winchester	Southampton	Test Valley	New Forest	Fareham
Eastleigh	Winchester	Southampton	Test Valley	New Forest	Fareham
Hedge End, West End and Botley	Southampton	Winchester	Fareham	Portsmouth	Test Valley

Source: ONS (Census 2011)

Table A4.6b: Top Five Origins of Eastleigh Sub-area In-commuters (Outside of Eastleigh)

Sub-area	1st	2nd	3rd	4th	5th
Bishopstoke, Fair Oak and Horton Heath	Southampton	Winchester	Fareham	Test Valley	New Forest
Bursledon, Hamble-le-Rice and Hound	Southampton	Fareham	New Forest	Portsmouth	Winchester
Chandler's Ford and Hiltingbury	Southampton	Test Valley	New Forest	Winchester	Fareham
Eastleigh	Southampton	Test Valley	Winchester	New Forest	Fareham
Hedge End, West End and Botley	Southampton	Fareham	Winchester	New Forest	Test Valley

Source: ONS (Census 2011)

Table A4.7: Modelled Household Income 2013/14

Sub-area	MSOA code	MSOA name	Total weekly income (£)	Net income after housing costs (£)
Bishopstoke, Fair Oak and Horton Heath	E02004716	Eastleigh 005	860	590
	E02004719	Eastleigh 008	990	670
Bursledon, Hamble-le-Rice and Hound	E02004724	Eastleigh 013	840	580
	E02004725	Eastleigh 014	810	580
	E02004726	Eastleigh 015	1,030	700
Chandler's Ford and Hiltingbury	E02004712	Eastleigh 001	1,160	700
	E02004714	Eastleigh 003	980	690
Eastleigh	E02004713*	Eastleigh 002	960	690
	E02004715**	Eastleigh 004	840	580
	E02004717	Eastleigh 006	740	530
	E02004718	Eastleigh 007	840	530
Hedge End, West End and Botley	E02004720	Eastleigh 009	840	630
	E02004721	Eastleigh 010	1,200	730
	E02004722	Eastleigh 011	760	560
	E02004723	Eastleigh 012	950	670

Source: ONS (2016). *Part in Chandler's Ford and Hiltingbury, but allocated to Eastleigh.** Part in Bishopstoke, Fair Oak and Horton Heath, but allocated to Eastleigh.

Table A4.8: Working Age (16-64 years) Claimant Count and Rates 2013-2016

	Oct 2013		Oct-14		Oct-15		Oct-16	
	No.	Rate	No.	Rate	No.	Rate	No.	Rate
Eastleigh	1,000	1.2	695	0.9	505	0.6	510	0.6
Solent LEP	17,410	2.2	11,270	1.4	8,850	1.1	8,740	1.1
United Kingdom	1,270,600	3.1	898,870	2.2	756,585	1.8	767,300	1.9

Source: ONS (2016)

Table A4.9: 16-24 years Claimant Count and Rates 2013-2016

	Oct 2013		Oct-14		Oct-15		Oct-16	
	No.	Rate	No.	Rate	No.	Rate	No.	Rate
Eastleigh	235	1.8	155	1.2	125	1.0	140	1.1
Solent LEP	4,590	2.9	2,720	1.7	1,975	1.2	2,025	1.3
United Kingdom	334,905	4.5	220,555	3.0	176,385	2.4	175,070	2.4

Source: ONS (2016)

Table A4.10: (25-49 years Claimant Count and Rates 2013-2016

	Oct 2013		Oct-14		Oct-15		Oct-16	
	No.	Rate	No.	Rate	No.	Rate	No.	Rate
Eastleigh	535	1.2	385	0.9	255	0.6	260	0.6
Solent LEP	9,355	2.4	6,135	1.6	4,705	1.2	4,520	1.2
United Kingdom	708,220	3.2	499,105	2.3	412,640	1.9	407,130	1.9

Source: ONS (2016)

Table A4.11: 50+ Claimant Count and Rates 2013-2016

	Oct 2013		Oct-14		Oct-15		Oct-16	
	No.	Rate	No.	Rate	No.	Rate	No.	Rate
Eastleigh	215	0.9	160	0.6	120	0.5	115	0.5
Solent LEP	3,355	1.5	2,405	1.1	2,165	0.9	2,195	1.0
United Kingdom	224,975	1.9	177,310	1.5	166,390	1.4	184,250	1.5

Source: ONS (2016)

Table A4.12: Working Age Claimant Count and Rates 2013-2016

	Oct 2013		Oct-14		Oct-15		Oct-16	
Sub-area	No.	Rate	No.	Rate	No.	Rate	No.	Rate
Bishopstoke, Fair Oak and Horton Heath	115	0.9	95	0.7	60	0.5	55	0.4
Bursledon, Hamble-le-Rice and Hound	150	1.3	105	0.9	80	0.7	80	0.7
Chandlers Ford and Hiltingbury	115	0.9	60	0.5	50	0.4	60	0.5
Eastleigh	400	2.0	295	1.5	205	1.0	185	0.9
Hedge End, West End and Botley	215	0.9	145	0.6	105	0.4	135	0.6

Source: ONS (2016)

Table A4.13: 16-24 years Claimant Count and Rates 2013-2016

	Oct 2013		Oct-14		Oct-15		Oct-16	
Sub-area	No.	Rate	No.	Rate	No.	Rate	No.	Rate
Bishopstoke, Fair Oak and Horton Heath	35	1.7	25	1.2	10	0.5	10	0.5
Bursledon, Hamble-le-Rice and Hound	45	2.5	25	1.4	20	1.1	20	1.1
Chandlers Ford and Hiltingbury	25	1.2	10	0.5	15	0.7	20	1.0
Eastleigh	80	2.4	55	1.6	50	1.5	50	1.5
Hedge End, West End and Botley	50	1.4	35	1.0	30	0.8	35	1.0

Source: ONS (2016)

Table A4.14: 25-49 years Claimant Count and Rates 2013-2016

	Oct 2013		Oct-14		Oct-15		Oct-16	
Sub-area	No.	Rate	No.	Rate	No.	Rate	No.	Rate
Bishopstoke, Fair Oak and Horton Heath	60	1.0	50	0.8	25	0.4	25	0.4
Bursledon, Hamble-le-Rice and Hound	70	1.1	55	0.9	40	0.6	40	0.6
Chandlers Ford and Hiltingbury	55	0.9	30	0.5	25	0.4	25	0.4
Eastleigh	230	2.1	175	1.6	120	1.1	100	0.9
Hedge End, West End and Botley	120	0.9	75	0.6	45	0.4	70	0.6

Source: ONS (2016).

Table A4.15: 50+ Claimant Count and Rates 2013-2016

	Oct 2013		Oct-14		Oct-15		Oct-16	
Sub-area	No.	Rate	No.	Rate	No.	Rate	No.	Rate
Bishopstoke, Fair Oak and Horton Heath	20	0.5	20	0.3	25	0.6	15	0.3
Bursledon, Hamble-le-Rice and Hound	35	0.9	25	0.4	15	0.4	15	0.4
Chandlers Ford and Hiltingbury	30	0.7	20	0.3	10	0.2	15	0.3
Eastleigh	85	1.7	60	0.5	40	0.8	30	0.6
Hedge End, West End and Botley	40	0.6	30	0.2	30	0.4	35	0.5

Source: ONS (2016).

Table A4.16: Sub-area Working Age Client Group Benefit Claimants Annual Change

Absolute and percentage point change May 2015-May 2016	Bishopstoke, Fair Oak and Horton Heath No.	ppts	Bursledon, Hamble-le-Rice and Hound No.	ppts	Chandlers Ford and Hiltingbury No.	ppts	Eastleigh No.	%	Hedge End, West End and Botley No.	ppts
Total claimants	-45	-0.4	-15	-0.1	-5	-0.1	-65	-0.3	-100	-0.4
*Job seekers**	-20	-0.2	0	0.0	-5	0.0	-70	-0.4	-20	-0.1
ESA and incapacity benefits	5	0.1	10	0.1	10	0.1	20	0.1	-35	-0.1
Lone parents	-15	-0.1	-15	-0.1	0	0.0	15	0.1	-20	-0.1
Others income related benefits	5	0.1	5	0.0	0	0.0	-15	-0.1	0	0.0
Main out-of-work benefits	-25	-0.2	0	0.0	5	0.0	-50	-0.3	-75	-0.3
Disabled**	-25	-0.1	-20	-0.1	-20	-0.2	-20	-0.1	-40	-0.2
Carers	0	0.0	0	0.0	0	0.0	5	0.0	10	0.0
Bereaved	5	0.1	5	0.1	10	0.1	0	0.0	5	0.1

Source: DWP (2016). *JSA excludes UC claimants. ** Disabled excludes PIP claimants.

Table A4.17: Sub-area Working Age Client Group Benefit Claimants Change on 2010

Absolute and percentage point change May 2010-May 2016	Bishopstoke, Fair Oak and Horton Heath No.	ppts	Bursledon, Hamble-le-Rice and Hound No.	ppts	Chandlers Ford and Hiltingbury No.	ppts	Eastleigh No.	%	Hedge End, West End and Botley No.	ppts
Total claimants	-155	-1.2	-250	-2.1	-155	-1.3	-495	-2.7	-285	-1.2
*Job seekers**	-145	-1.2	-140	-1.1	-140	-1.1	-395	-2.2	-225	-0.9
ESA and incapacity benefits	25	0.2	-5	0.0	-20	-0.2	-50	-0.3	-50	-0.2
Lone parents	-40	-0.3	-100	-0.8	-15	-0.2	-70	-0.4	-85	-0.4
Others income related benefits	-30	-0.2	-45	-0.4	-10	-0.1	-35	-0.2	-20	-0.1
Main out-of-work benefits	-190	-1.4	-290	-2.4	-185	-1.5	-550	-3.1	-380	-1.6
Disabled**	-10	0.0	-10	0.0	-5	-0.1	10	0.1	15	0.0
Carers	45	0.3	40	0.3	45	0.3	50	0.3	75	0.3
Bereaved	0	0.0	10	0.1	-10	0.0	-5	0.0	5	0.1

Source: DWP (2016). *JSA excludes UC claimants. ** Disabled excludes PIP claimants.

Figure A4.18: Eastleigh 2016 Provisional School Data

	Progress 8 score, description	Attainment 8 score	Grade C or better in English & maths GCSEs	Achieving the English Bacca-laureate	Entering the English Bacca-laureate	Staying in education or entering employment (2014 leavers)
Thorndean School	0.40	60.2	87	57	61	96
Wildern School	0.17	53.8	70	22	32	98
Toynbee School	0.16	52.6	71	25	33	95
Wyvern	0.12	52.9	69	39	53	94
The Hamble School	0.09	49.2	64	19	30	92
Crestwood	-0.20	47.4	60	19	30	90

Source: Department for Education 2016. Green –above national average. Orange – close to national average. Pink – below national average.