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Main points

The following is based on the intentions of households and projected demographic changes; it does not account for other factors such as building of new properties.

- Before the supply of new dwellings, there is a net shortfall of 310 units, driven by:
 - an anticipated shortfall of 1,510 mostly smaller sized dwelling units
 - an anticipated surplus of 1,200 mostly larger sized dwelling units
- There is a potential shortfall of around 190 units in the owner-occupier sector; in particular, there is a potential shortfall of 820, 2-bedroom properties in this sector.
- Under the baseline scenario of +400 net migration, there is a potential surplus of around 10 units of non-qualified accommodation; however, there is a potential shortfall of 420 units of 1-bedroom properties in this sector.
- The potential surpluses and shortfalls in the qualified tenures of accommodation are impacted less by the level of net inward migration during the next three years, than non-qualified accommodation.
 - Under a scenario of net nil migration there would be a potential surplus of around 500 units of non-qualified accommodation.
 - Under a scenario of +800 net migration, there would be a potential shortfall of around 380 units of non-qualified accommodation.
- When applying affordability criteria (using lower quartile prices and a six times income multiplier), qualified tenures are more impacted than non-qualified.
 - The shortfall of 2-bedroom owner-occupier properties is substantially reduced as households are instead accommodated in the rental sector or remain a concealed household such as by continuing to live with family.
 - This leads to a surplus of 640 units in the owner-occupied sector, instead of a shortfall of 190 units, but an increased shortfall of 450 units in the qualified rental sector.

Things you need to know

This report provides estimates of Jersey's potential housing requirements for the three-year period 2026 to 2028 in terms of the type, tenure and size of dwelling unit. This includes supply and demand from demographic changes based on [household projections](#) and the intentions of households. Housing intentions were gauged using the [2025 Jersey Opinions and Lifestyle Survey](#), which included questions about housing intentions over the next three-year period.

Throughout this report the baseline migration scenario of +400 individuals a year has been used, unless otherwise stated.

This report has used population and housing projections based upon an updated methodology compared to previous Future Housing Needs reports. As such results are not strictly comparable; see the [methodology document](#) for more information.

In around 28% of households who responded that they intended to move in the next three years, part or all of the household planned to move outside Jersey. This is lower than in the 2022 survey (34%), but still above historic levels seen in the survey (around 13 to 15%). This supports the higher levels of supply seen from those leaving the Island used in this report, based on the [updated population and household projections](#), compared with previous reports.

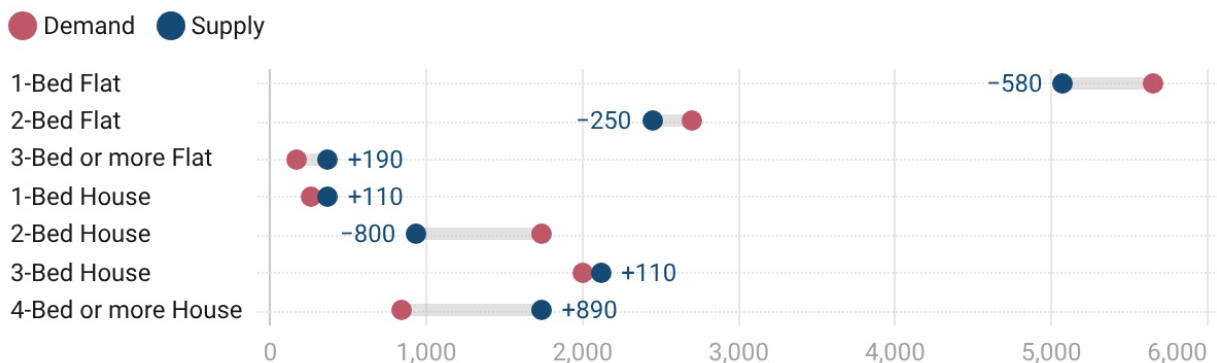
Additionally survey questions were asked to individuals at a point in time where activity in the [housing market](#) was relatively low (June to July 2025).

Type and size of dwelling unit

There is an overall net shortfall of 310 dwelling units over the reference period (2026 to 2028). There are notable shortfalls for smaller property types, 1- and 2-bedroom flats and 2-bedroom houses. 4-bedroom houses see the largest surplus, continuing a trend of decreasing intent of households to move to a 4-bedroom house in Jersey. Other property types saw smaller surpluses.

Figure 1: 2-Bedroom houses saw the largest shortfall, of 800 units

Supply and demand by type and size of dwelling; three year totals, 2026 to 2028



Source: Statistics Jersey • Created with Datawrapper

The sum of all potential shortfalls is around 1,620 dwelling units. However it is worth noting that some surpluses may make up for certain shortfalls, for example someone may move to a 1-bedroom house instead of a 1-bedroom flat.

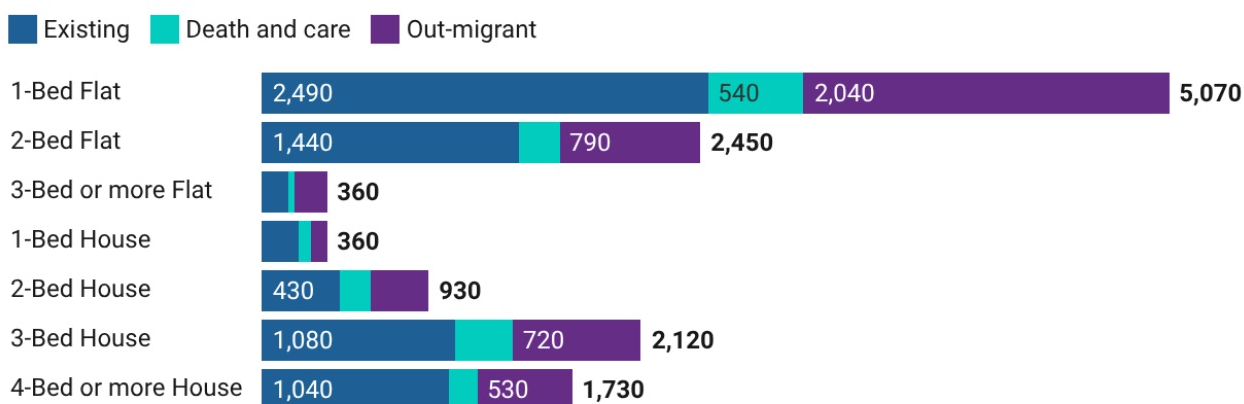
Supply

Within this report supply comes from three different areas:

- existing supply: properties becoming available due to the currently occupying householders moving to a different type or size of dwelling, (53% of total supply)
- death and care supply: properties becoming available due to the currently occupying householders moving into care homes or dying, (12% of total supply)
- out-migrant supply: properties becoming available due to the currently occupying householders leaving the Island, (36% of total supply)

Figure 2: The largest supply is of 1-bedroom flats

Supply by type and size of dwelling; three year totals, 2026 to 2028



Source: Statistics Jersey • Created with Datawrapper

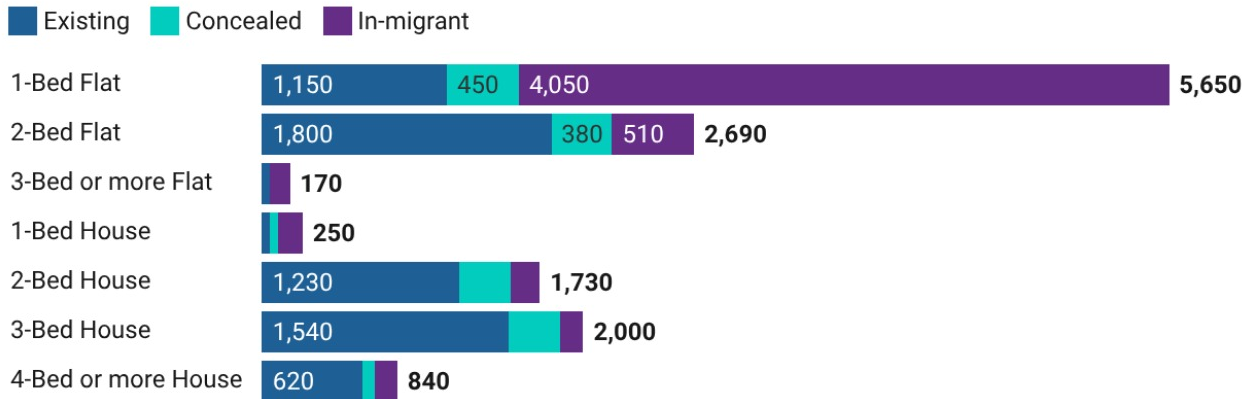
Demand

Within this report demand comes from three different areas:

- existing demand: properties needed due to households moving to a different type or size of dwelling, (48% of total demand)
- concealed demand: properties needed due to individuals moving out of an existing household for example, an individual moving into rental or owner occupancy from living with family, (12% of total demand)
- in-migrant demand: properties needed for those coming into the Island during the three-year period, (40% of total demand)

Figure 3: The majority of demand for 1-bedroom flats is by in-migrants

Demand by type and size of dwelling; three-year totals, 2026 to 2028



Source: Statistics Jersey • Created with Datawrapper

Over the three-year period around three-fifths (60%) of the total potential demand is from households planning to move within Jersey.

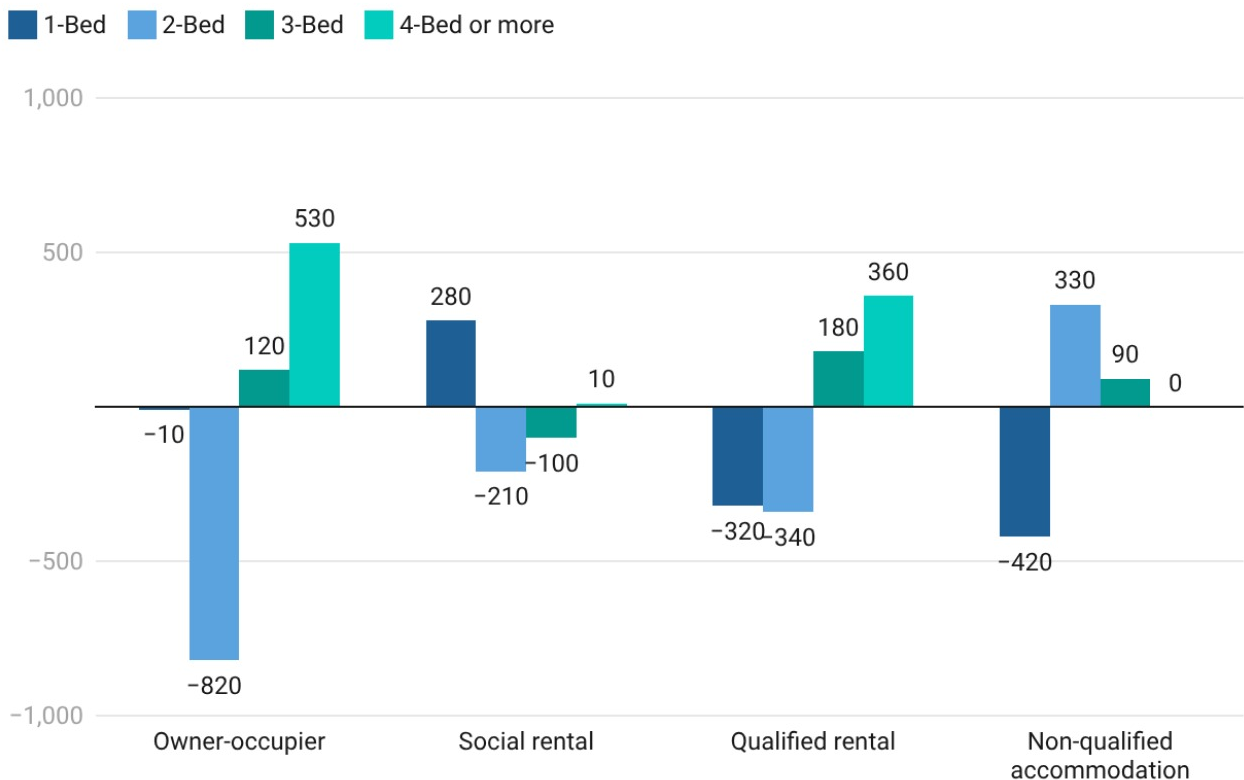
The remaining two-fifths (40%) of the total potential demand is from households moving to the Island, and in particular this group accounts for 72% of the demand for 1-bedroom flats.

Tenure and size of dwelling unit

In order to understand and identify in more detail where surpluses and shortfalls may potentially occur, it is necessary to examine the results in terms of the tenure of dwellings.

Figure 4: The largest shortfall was seen for 2-bedroom owner-occupier properties

Surpluses and shortfalls by tenure and size of dwelling; three-year totals, 2026 to 2028



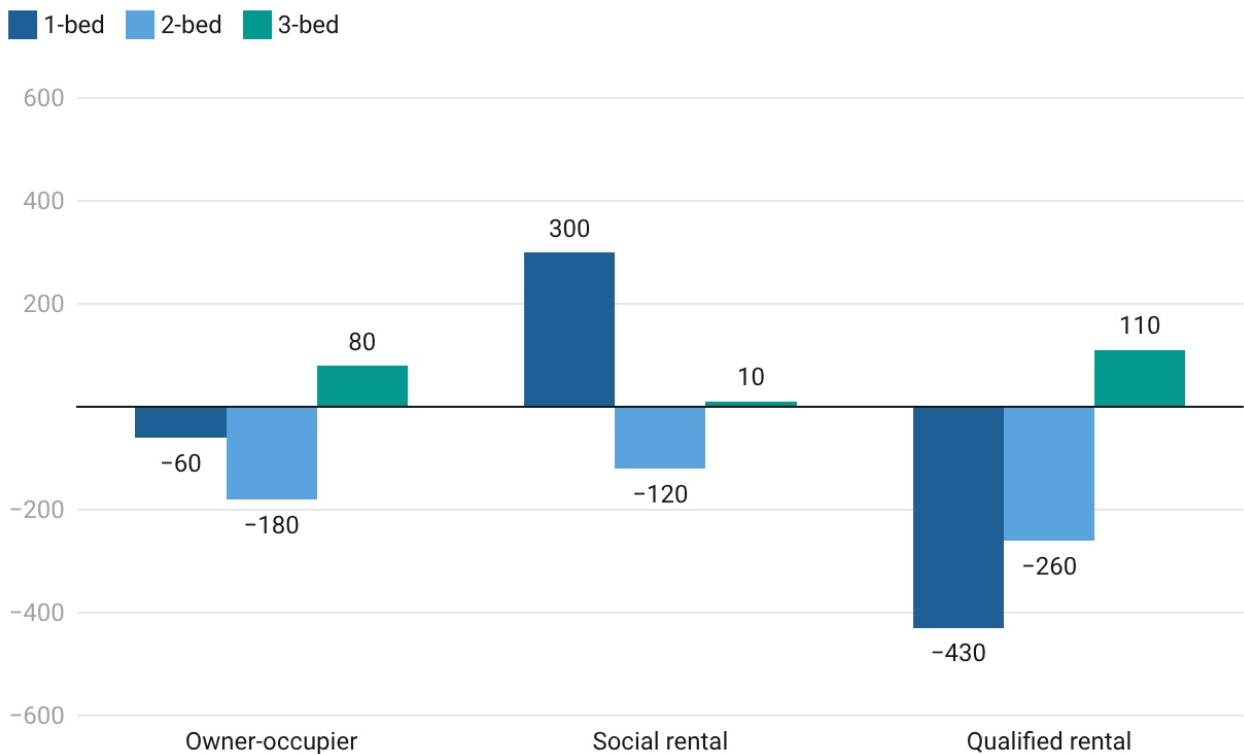
Source: Statistics Jersey • Created with Datawrapper

The largest part of the potential shortfalls over the next three years are within the owner-occupier sector, in particular there is a shortfall of 820 owner-occupier 2-bedroom properties.

The shortfalls in 1- and 2-bedroom properties in the qualified rental sector are largely due to individuals moving to these from non-qualified accommodation, once they become entitled or form a household with someone who has housing qualifications. As such if this demand is unmet the supply of non-qualified property will be lower.

Figure 5: Most sectors saw shortfalls in 1- and 2-bedroom flats

Surpluses and shortfalls of flats in qualified sectors; three-year totals, 2026 to 2028

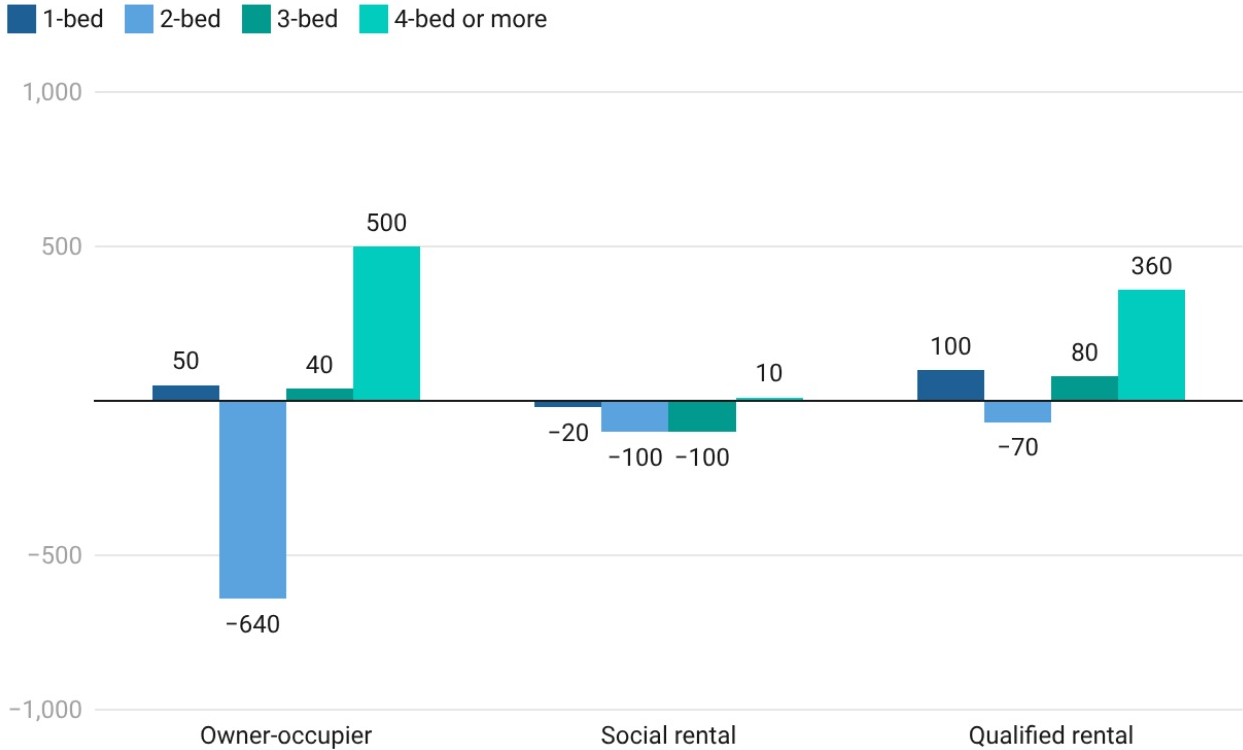


Source: Statistics Jersey • Created with Datawrapper

Whilst the totals for social housing rental demand are consistent with long term trends in applications (2019 to 2025 averages), recent years have seen slightly higher rates of application. In part this is due to expansion of eligibility criteria for social housing. If these higher rates of application are maintained then the demand for social housing would be around 300 properties higher over the three-year period, primarily for 1-bedroom flats.

Figure 6: The largest shortfall was seen for owner-occupied 2-bedroom houses

Surpluses and shortfalls of houses in qualified sectors; three-year totals, 2026 to 2028



Source: Statistics Jersey • Created with Datawrapper

There is a large shortfall for owner-occupied 2-bedroom houses, 640 dwelling units.

There is a large surplus of owner-occupied 4-bedroom houses, 500 dwelling units, and a slight surplus of owner-occupied 3-bedroom houses. This continues a trend of decreasing intent of households to purchase larger properties in Jersey that has been seen over the last two iterations of the survey.

Effect of migration

Any changes in net migration, different to current trends, will principally affect the levels of the potential shortfalls or surpluses in non-qualified accommodation, and particularly of 1-bedroom properties.

Although there is also demand from in-migrant households for accommodation in the qualified tenures (primarily from licensed households), most in-migrants will be of registered status, meaning that they can only rent in the non-qualified sector. These individuals cannot rent in the qualified sector or become an owner occupier for 10 years, unless they join a household that already has residential qualifications.

This means that the potential shortfalls and surpluses in the owner-occupier, social housing rental and qualified rental tenures are relatively insensitive to the level of net migration in the three-year period, when compared with the non-qualified category.

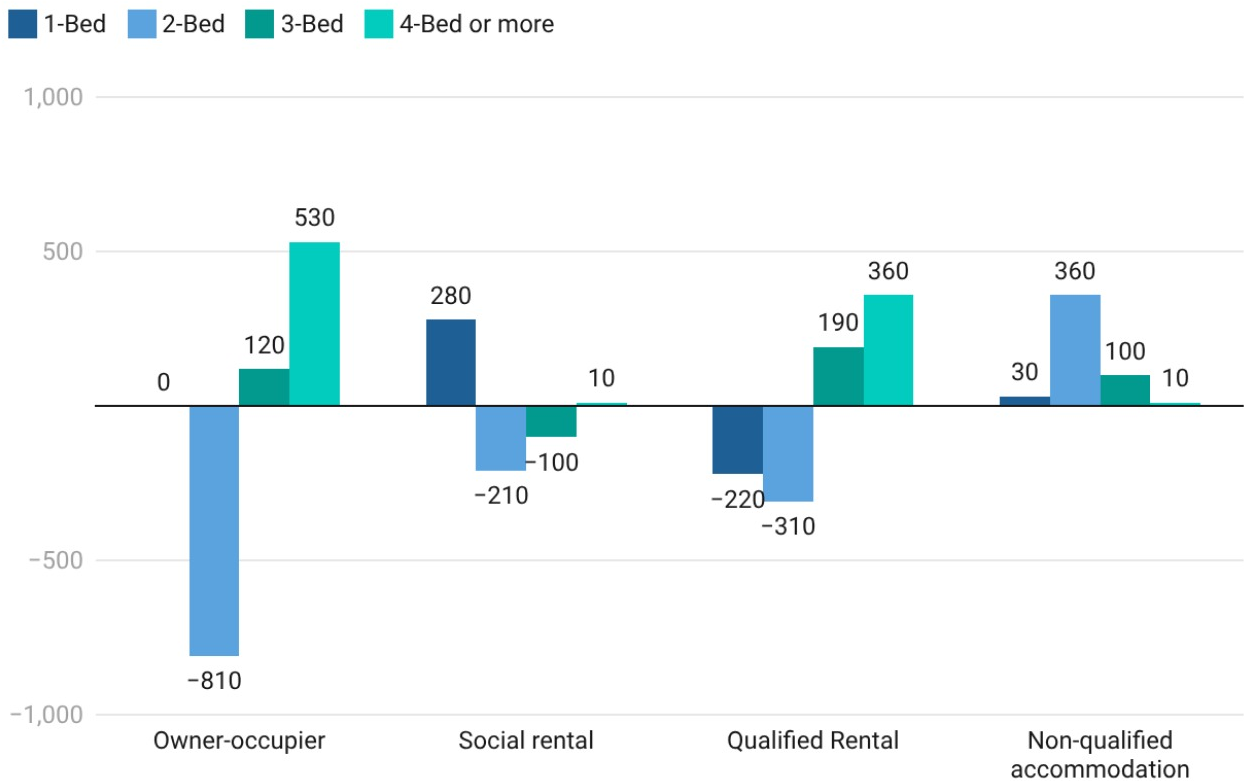
Below are four migration scenarios that are different to the +400 baseline assumption used in the rest of the report.

Under a net nil annual migration scenario there is an overall surplus of around 500 units in the non-qualified accommodation sector, particularly 2-bedroom accommodation.

Potential shortfalls in qualified accommodations are only slightly lower than those apparent under a +400 migration scenario.

Figure 7: Under a net nil migration scenario there is a surplus for all sizes of non-qualified accommodation

Surpluses and shortfalls by tenure and size of dwelling; three-year totals under net nil migration, 2026 to 2028

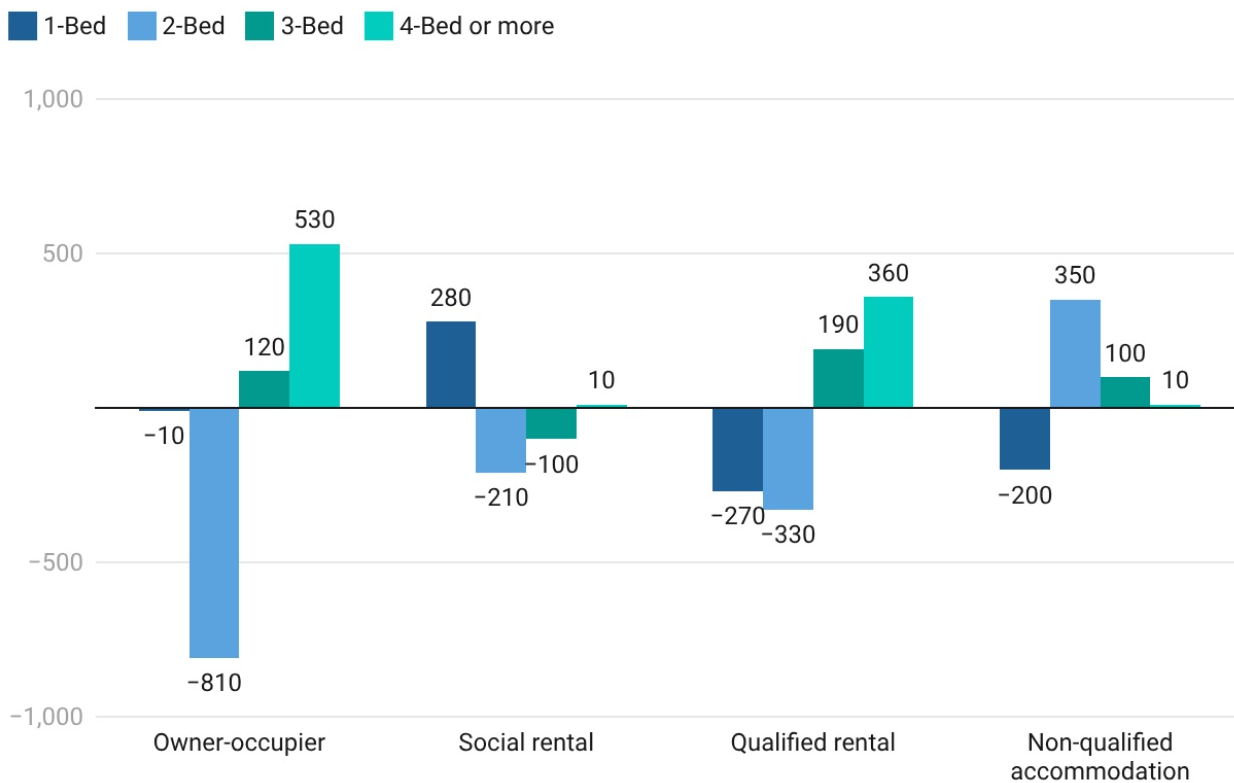


Source: Statistics Jersey • Created with Datawrapper

Under a +200 annual migration scenario there is now a shortfall of around 200 units of 1-bedroom non-qualified accommodation.

Figure 8: Under a +200 net migration scenario there is now a shortfall of 1-bedroom non-qualified accommodation

Surpluses and shortfalls by tenure and size of dwelling; three-year totals under +200 net migration, 2026 to 2028

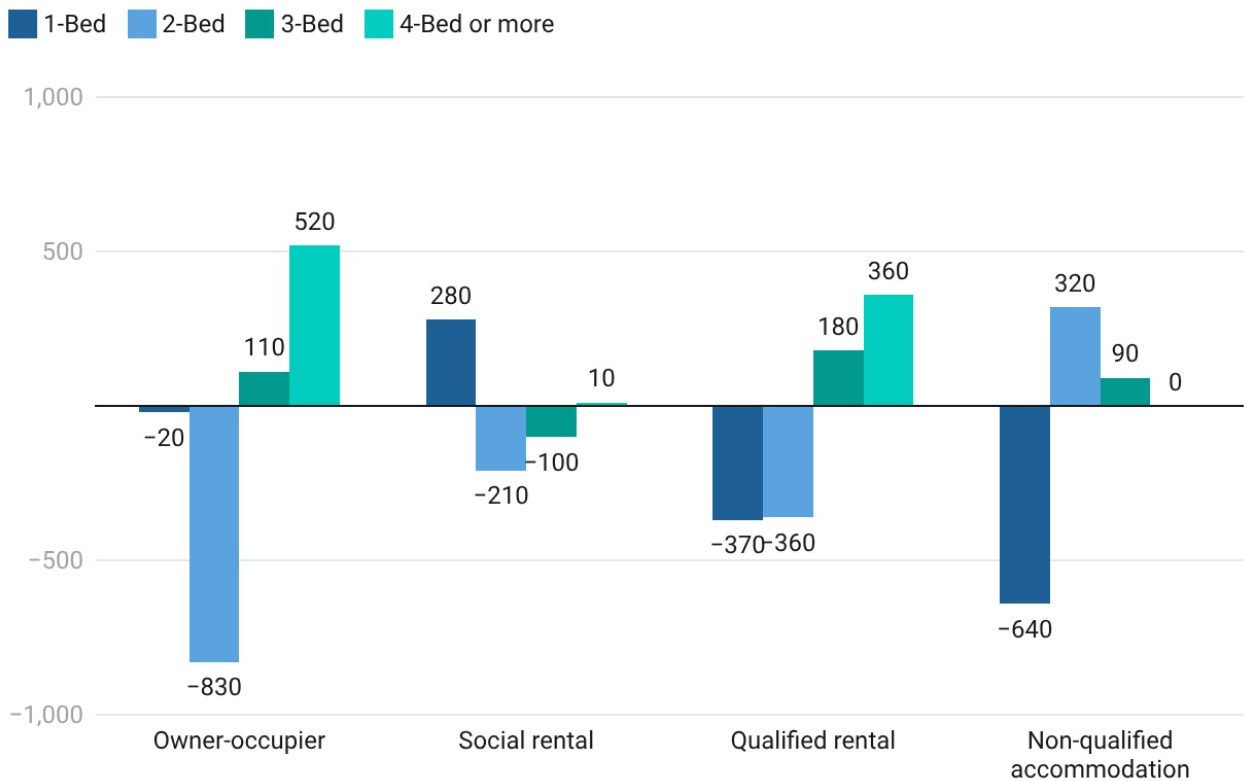


Source: Statistics Jersey • Created with Datawrapper

Under a +600 annual migration scenario there is now a shortfall of around 230 units of non-qualified accommodation.

Figure 9: Under a +600 net migration scenario there is now a shortfall of non-qualified accommodation overall

Surpluses and shortfalls by tenure and size of dwelling; three-year totals under +600 net migration, 2026 to 2028

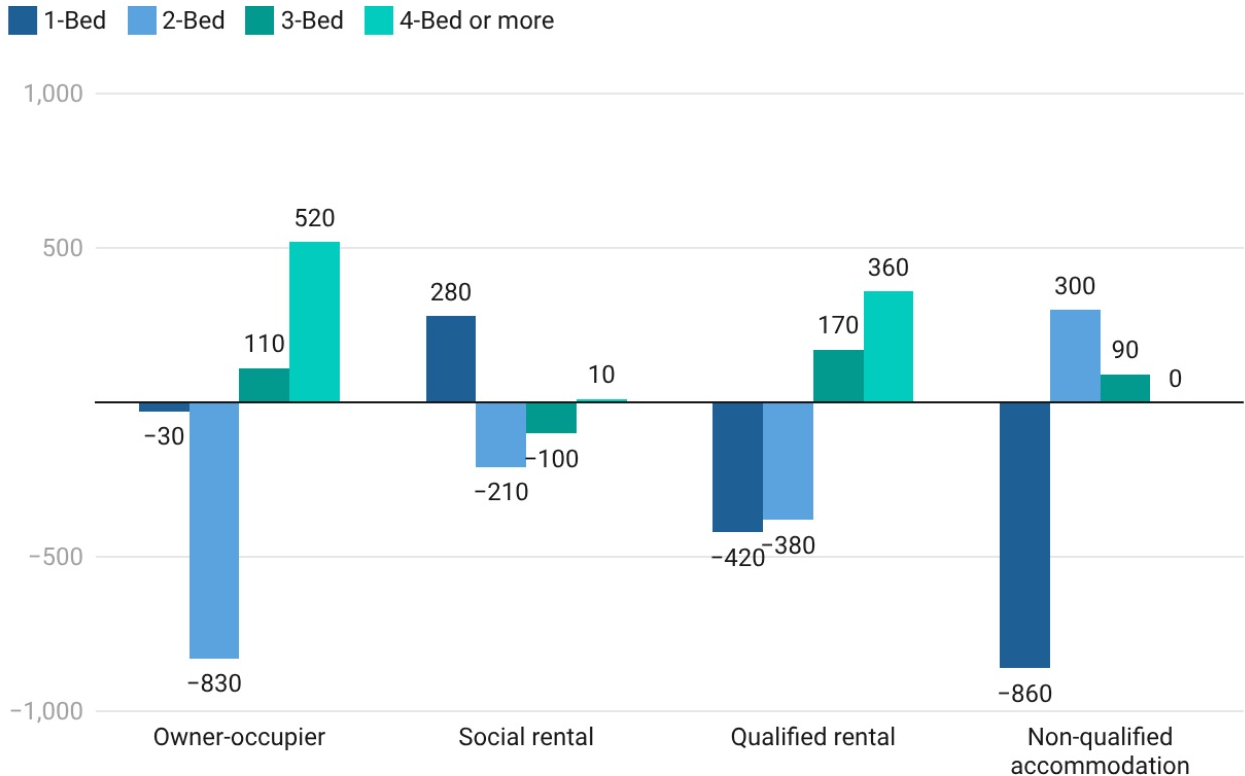


Source: Statistics Jersey • Created with Datawrapper

Under a +800 annual migration scenario the shortfall of 1-bedroom non-qualified accommodation, of 860 units, is the largest of any tenure and size combination.

Figure 10: Under a +800 net migration scenario there is now a shortfall 860 units of 1-bedroom non-qualified accommodation

Surpluses and shortfalls by tenure and size of dwelling; three-year totals under +800 net migration, 2026 to 2028



Source: Statistics Jersey • Created with Datawrapper

Affordability

Around 4,330 current resident households (either existing or concealed) are estimated to be planning to move into, or move within, the owner-occupier sector in the next three years. Around seven-tenths (70%) of such households are estimated to be intending to buy a property by means of a mortgage.

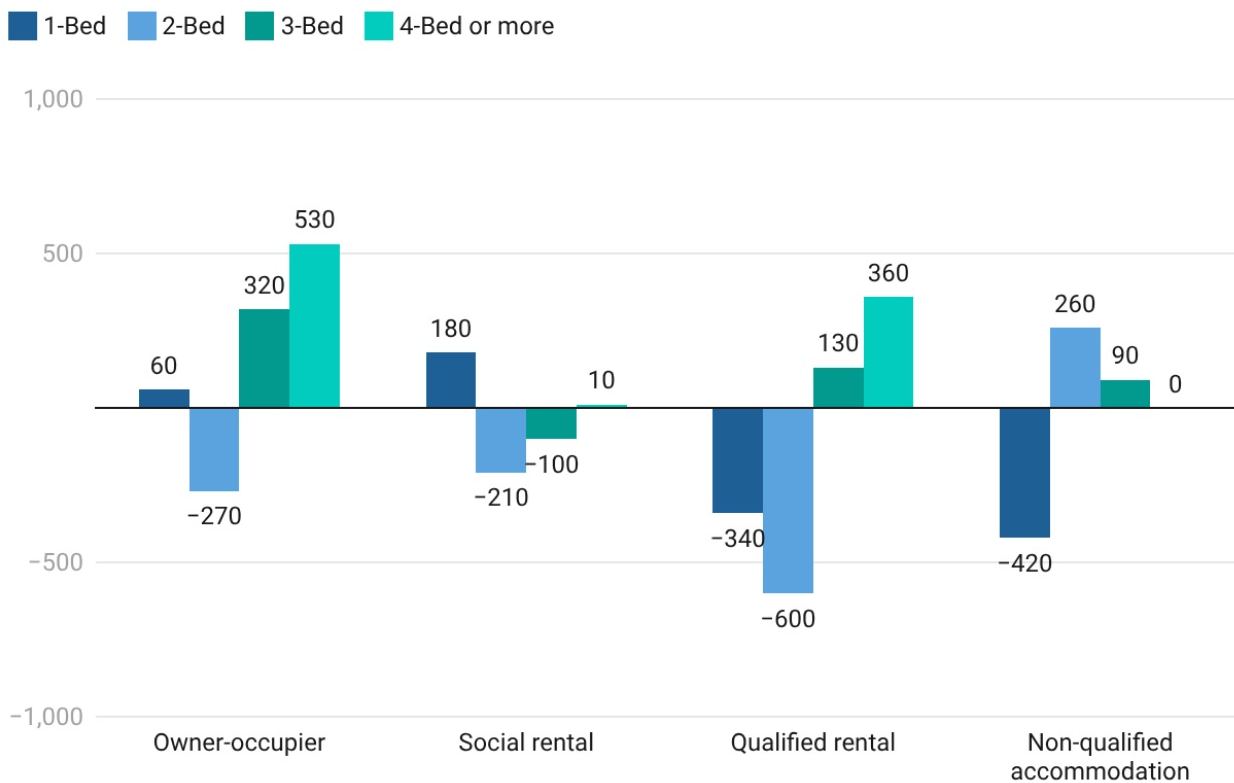
However, not all households who say they will move may be able to afford to do so. Households, planning to buy with a mortgage, that had an income less than six times the lower quartile price of the property they wanted to move to minus their deposit, were removed as being unable to afford.

It should be noted that some removed households would be able to afford their desired property with additional assistance either via the [assisted purchase pathway](#) or from family members.

After this criteria was applied, around 3,400 current resident households (either existing or concealed) are estimated to be planning to move into, or move within, the owner-occupier sector in the next three years.

Figure 11: After affordability criteria are applied the shortfall of 2-bedroom owner-occupier properties is greatly reduced

Surpluses and shortfalls by tenure and size of dwelling; three-year totals after applying affordability criteria, 2026 to 2028



Source: Statistics Jersey • Created with Datawrapper

Applying affordability criteria has a number of effects:

- the shortfall of 2-bedroom owner-occupier properties is reduced from 820 to 270 units; this results in a surplus of owner-occupier units overall of 640, compared with an initial shortfall of 190 units overall
- social housing rental and non-qualified accommodation are only slightly affected, due to individuals unable to move out of 1-bedroom and 2-bedroom properties respectively
- the shortfall of qualified rental properties increases from 120 to 450 units, primarily in 2-bedroom units
- the overall shortfall of 310 units changes to supply and demand being essentially the same, due to concealed households being unable to move

Data sources, past reports, and methods

Data tables and supplementary information associated with this release can be found on our open data site: [Future Housing Needs – Datasets – Open Data](#).

Find past reports on our [release calendar](#).

Full details of the methodology used in this report, including changes from previous reports, can be found in the [Future Housing Needs Methodology](#) document.

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