

1. Introduction

This briefing note presents the key findings from the 2018-based sub-national population projections (SNPPs) for South Gloucestershire. The new projections were published by the Office for National Statistics (ONS) on 24 March 2020 and replace the 2016-based subnational population projections.

The SNPPs provide estimates of the future population of all local authorities in England, assuming a continuation of recent local trends in births, deaths and migration. They do not attempt to predict the impact that future government or local policies, changing economic circumstances, local development policy, the capacity of an area to accommodate population or other factors might have on demographic behaviour. Importantly this means that the level of housing development proposed in South Gloucestershire’s adopted Core Strategy is not fully reflected in these projections.

The primary purpose of the sub-national projections is to provide an estimate of the future size and age structure of the population of local authorities in England. These are used as a common framework for informing local-level policy and planning in a number of different fields as they are produced in a consistent way.

This note provides a summary of the projections for South Gloucestershire in the context of the West of England sub-region and draws broad comparisons with previously published ONS population projections.

2. Headline findings

The latest projections suggest that the population of South Gloucestershire will rise to 354,300 in 2043, a 25.3% increase on the 2018 baseline (282,600).

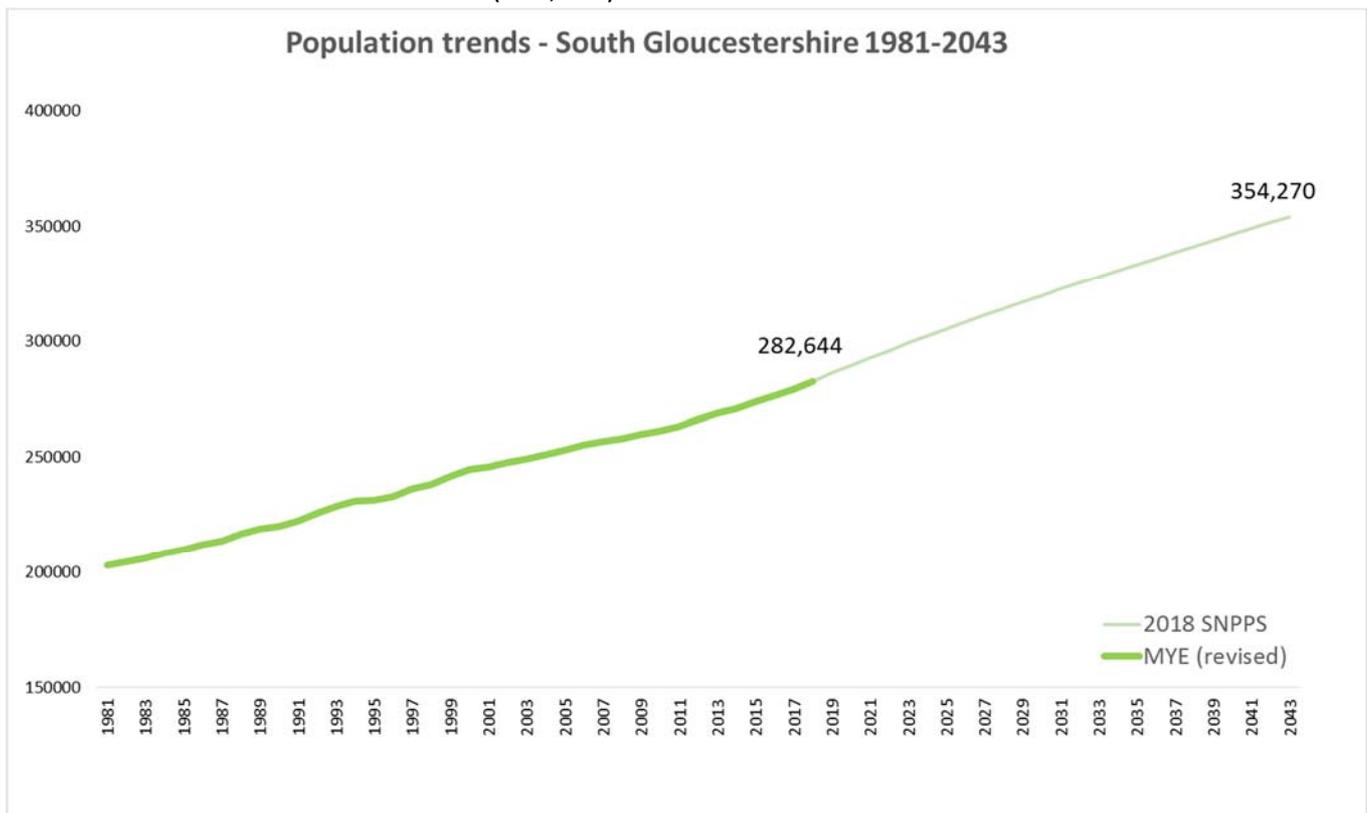


Fig1. Estimated and projected population change in South Gloucestershire 1981-2043

By 2041 the population of the West of England sub-region is projected to increase by 206,100 to approximately 1.36 million people. South Gloucestershire is, by some margin, projected to undergo the highest rates of population growth over this period at 25.4%, whilst Bristol is projected to have the lowest rate of population growth (15.0%).

	Total population		Change	
	2018 Count	2043 Count	Change 2018-43 Count	Change 2018-43 %
BANES	192,100	223,000	30,900	16.1%
Bristol	463,400	532,700	69,300	15.0%
North Somerset	213,900	248,100	34,200	16.0%
South Gloucestershire	282,600	354,300	71,700	25.4%
West of England	1,152,000	1,358,100	206,100	17.9%

Table 1: Projected population change West of England sub-region 2018-43

3. Rates of population growth

Figure 2 illustrates that the rate of projected population growth in South Gloucestershire and Bristol is considerably higher than is projected in North Somerset and BANES.

The projections also suggest that the rate of population growth in South Gloucestershire will gradually slow through the projection period; from an average of +3,150 people per annum (ppa) over the first 10 year period, to an average of +2,550 ppa over the last five years of the projection period – a trend which is replicated in each of the West of England UAs.

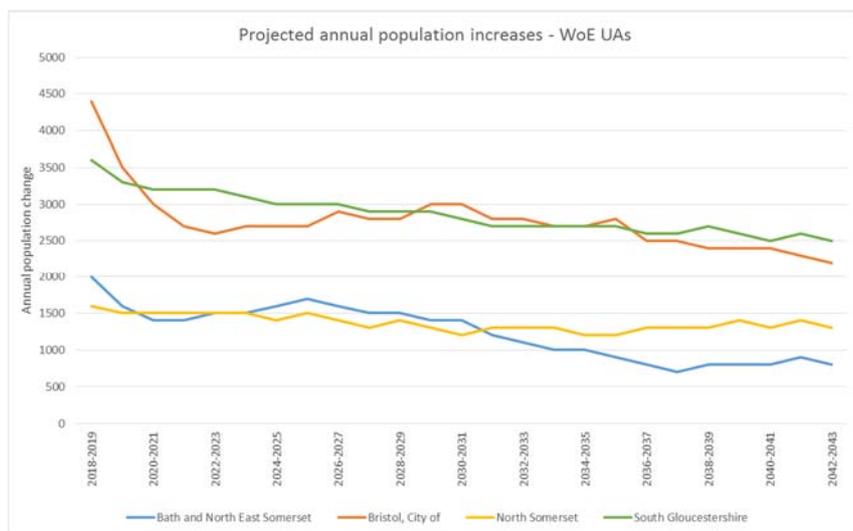


Fig 2: Projected Annual population increases (WoE – UA's)

4. Components of population change

Fig 3. (overleaf) illustrates the projected 'components of change' for South Gloucestershire. In summary:

- **Natural change:** Population growth through natural change (births minus deaths) is projected increase through the projection period from +900 ppa to approximately +1,300ppa.
- **Migration:** Population growth through (total) migration is projected to slow through the projection period; from a net increase of 2,600 ppa in 2018/19 to 1,100 ppa in 2042/43. Fig 3. also illustrates the very high projected flows of internal migrants¹ into and out of the district. Projected flows (and net change) from international migration and cross-border flows² are projected to be considerably lower.

¹ Internal migration: Moves between local authorities in England.

² Cross-border migration: Moves between England and Wales, Scotland and Northern Ireland

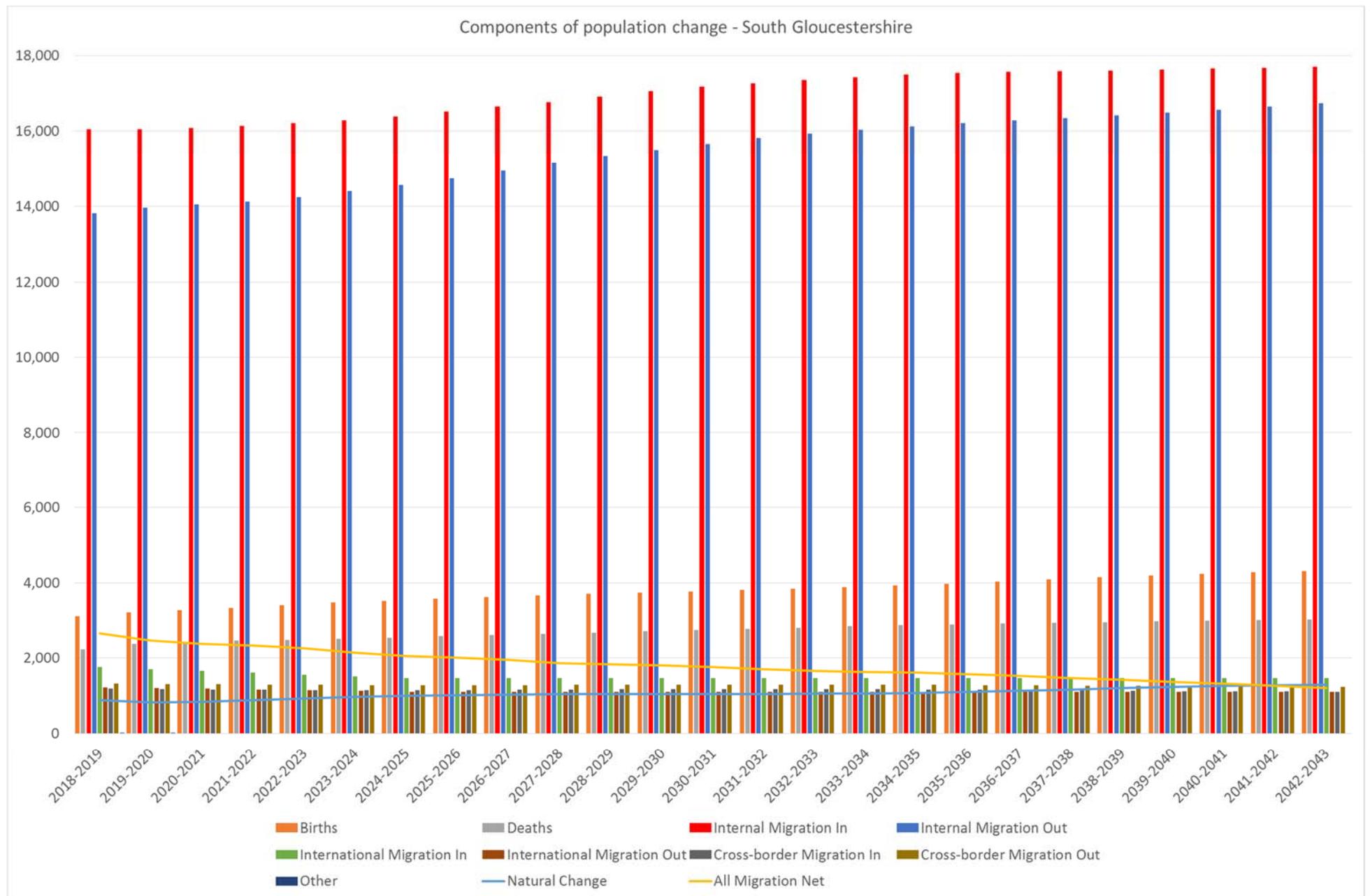


Fig 3: Components of projected population change – South Gloucestershire

5. Age structure change

At the start of the projection period in 2018 in South Gloucestershire, approximately 19% of the resident population were children, nearly two thirds (63%) are of working age (16-64yrs) and 19% are over the age of 64yrs. By 2041, the latest ONS projections suggest that:

- The number of children will have increased by 14,100 - although proportions will remain broadly consistent (at 19%);
- The number of working age residents will have increased by 37,900 (representing a 4% decrease in proportional terms);
- The number of older people (those aged over 64yrs) will have increased by 23,100 (representing a 4% increase in proportional terms).

These trends are illustrated in Table 2 and graphically in Figs 4-6.

Population change 2018-43				
Age Group	2018 counts	2043 counts	Change counts	Change %
Children (0-15yrs)	53,000	67,100	14,100	27%
Working age (16-64 yrs)	176,900	214,800	37,900	21%
Older people (65+)	52,800	75,900	23,100	44%
Total	282,700	357,800	75,100	27%

Proportion of population (%)		
2018 %	2043 %	Change %
19%	19%	-1%
63%	60%	-4%
19%	21%	4%
100%	100%	0%

Table 2. South Gloucestershire - Broad age structure change 2016/41

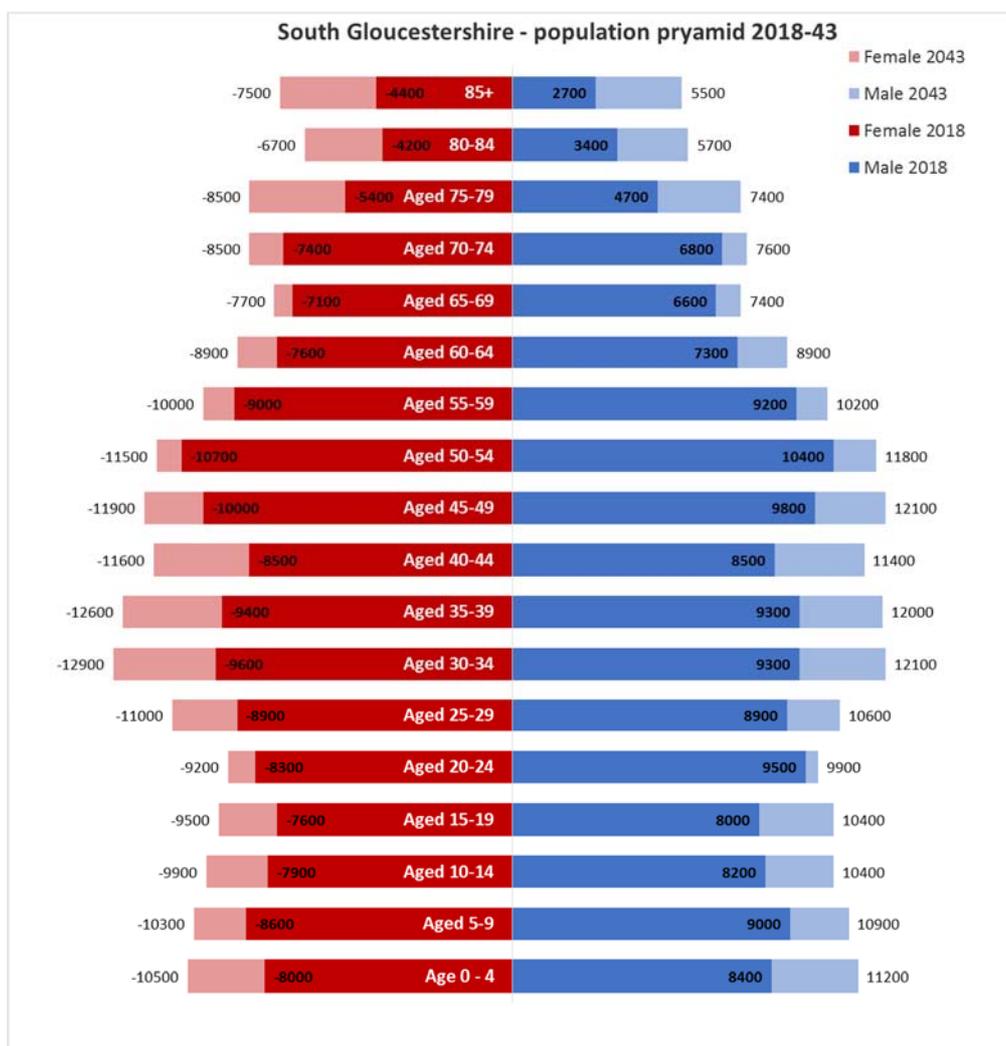


Fig 4. South Gloucestershire - Age structure change 2018/43 (age/sex)

Fig 5. illustrates the same dataset by single year of age. In 2043, South Gloucestershire is projected to see an increase in population in all age groups. Notably it is projected there will be a higher proportion of the population aged over 65yrs.

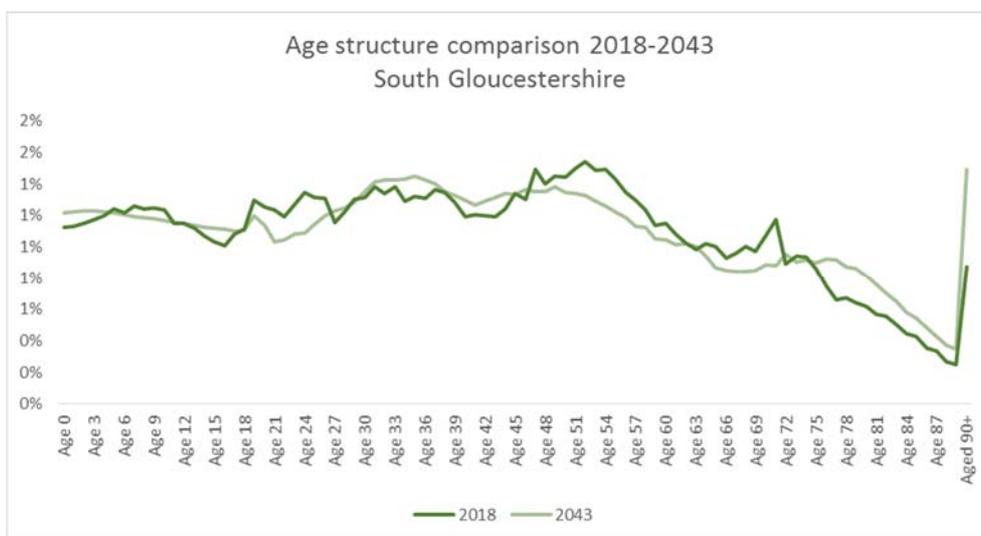


Fig 5. South Gloucestershire – proportional age structure change 2018/43

Figs 6 (a-d) illustrates the variation in the current and projected age structures of the local authorities in the sub-region. There is a national trend towards an aging population with North Somerset in particular projected to undergo a significant increase in the number of residents aged over 90yrs.

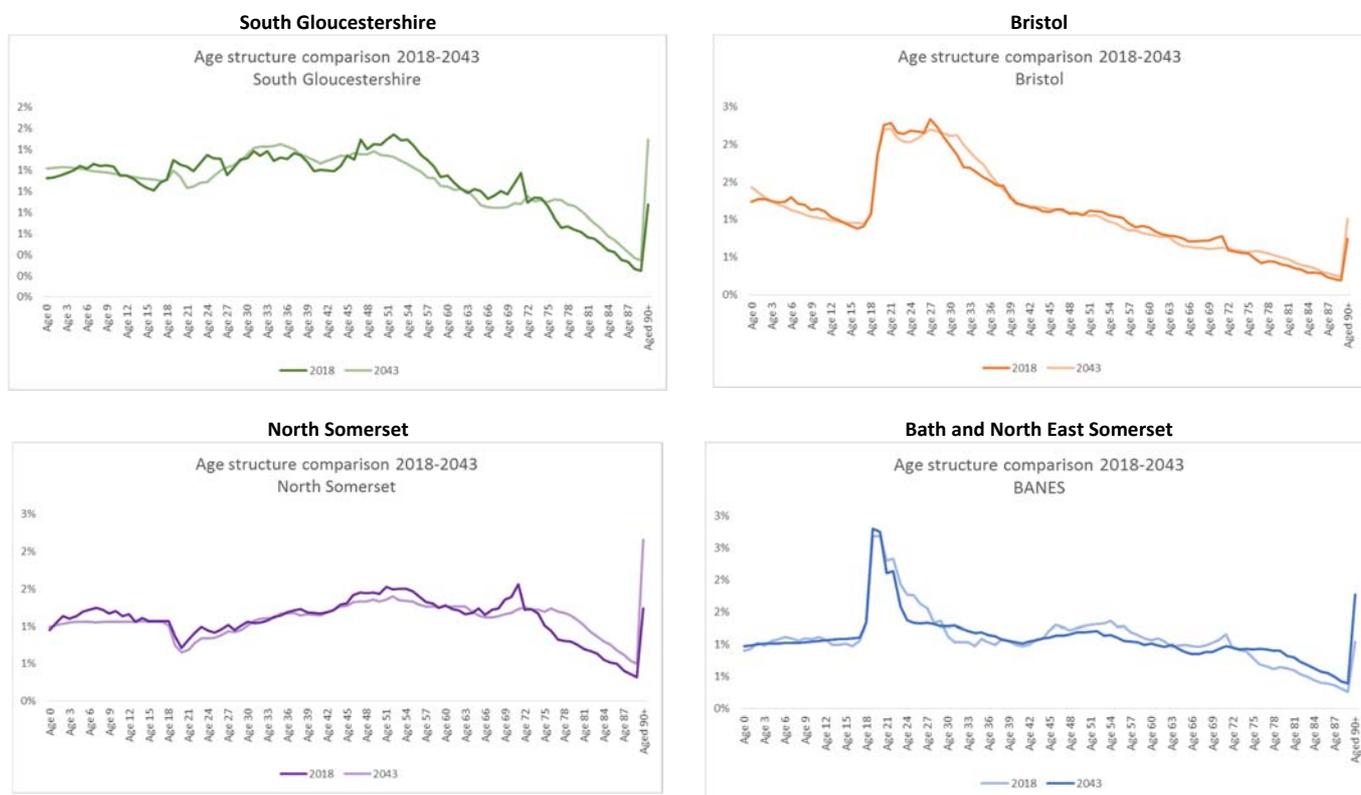


Fig 6 (a-d). Comparison of age structure change 2016/41 – West of England UAs

6. Comparison with previous ONS projections

The ONS generally update their population projections (SNPPs) every two years. Fig 7 compares the 2018 SNPPs for South Gloucestershire with other recently published ONS projections³.

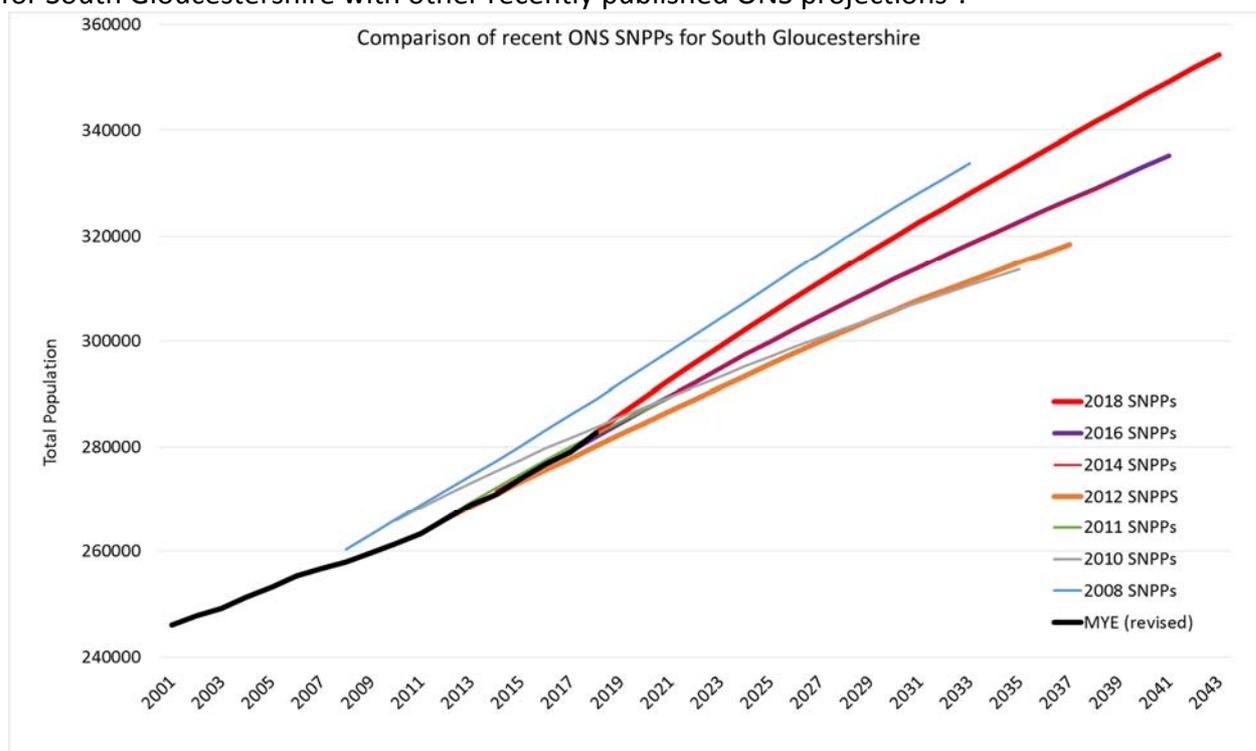


Fig 7. Comparison of recent ONS SNPPs for South Gloucestershire – Total population

These latest projections suggest that; at an average of +2,900 persons per year (ppa), the population of the district will increase at a much faster rate than was projected in recent past SNPPs. The rate of increase is comparable to the 2008 SNPPs, however even against this dataset (which was influenced by the A8 countries joining the EU) the short-term trends are higher (+ 3,100 ppa compared to +2,900 ppa).

Average annual increase (persons per year)			
	Projection period	Long-term trend (over full projection period)	Short-term trend (over first 10 years of projection period)
2018 SNPPs	2018-2043	2900	3100
2016 SNPPs	2016-2041	2300	2600
2014 SNPPs	2014-2039	2400	2600
2012 SNPPs	2012-2037	2100	2300
2011 SNPPs	2011-2021	2600	2600
2010 SNPPs	2010-2035	1900	2200
2008 SNPPs	2008-2033	2900	2900

Table 3. Comparison Annual rates of population growth in recent SNPPs

³ Direct comparison between projections is complicated by the fact that the various projections are based on different timescales.

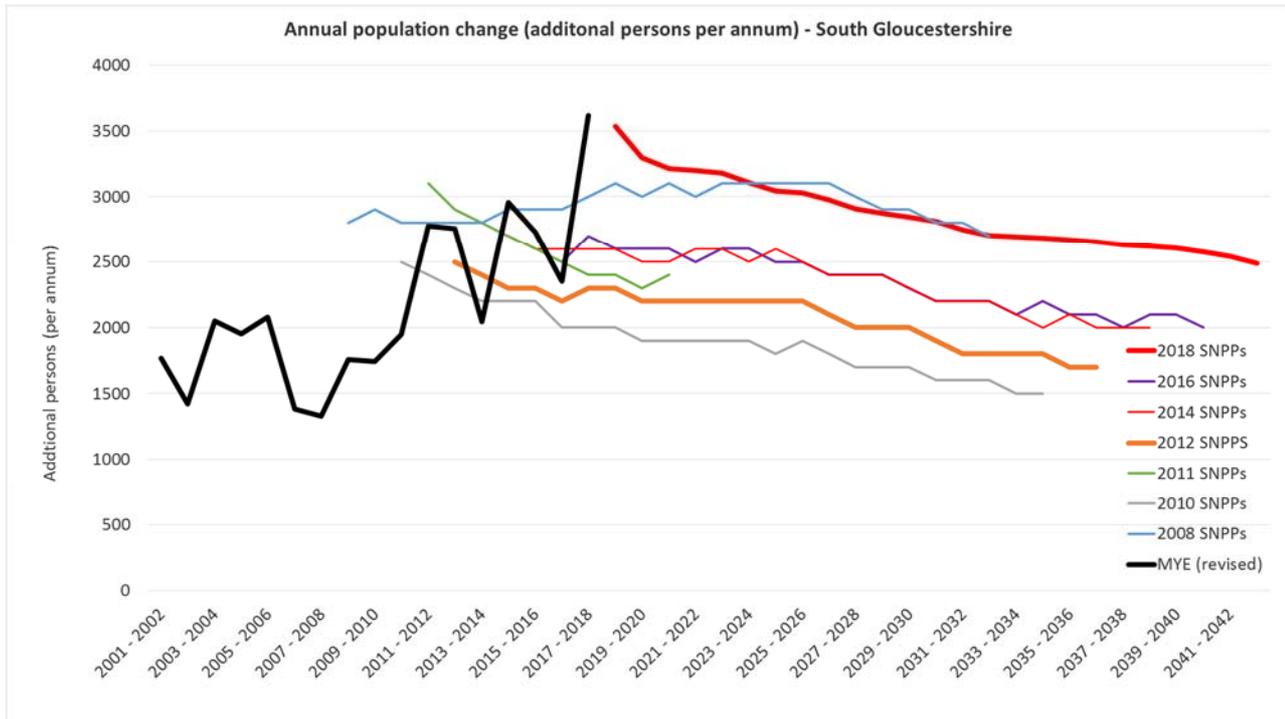


Fig 8. Comparison of recent ONS SNPPs for South Gloucestershire – Total annual change in population (counts)

7. Further information

For further information about these population projections contact the Corporate Research and Consultation Team – 01454 863990, or email andy.cornelius@southglos.gov.uk

