

1. Introduction

This briefing note presents the key findings from the 2012-based sub-national population projections (SNPPs) for South Gloucestershire. The new projections were published by the Office for National Statistics (ONS) on 29 May 2014 and are the first set of projections to provide a full update of trends following the 2011 Census¹.

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 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 318,400 in 2037, a 19.6% increase on the 2012 baseline (266,100).

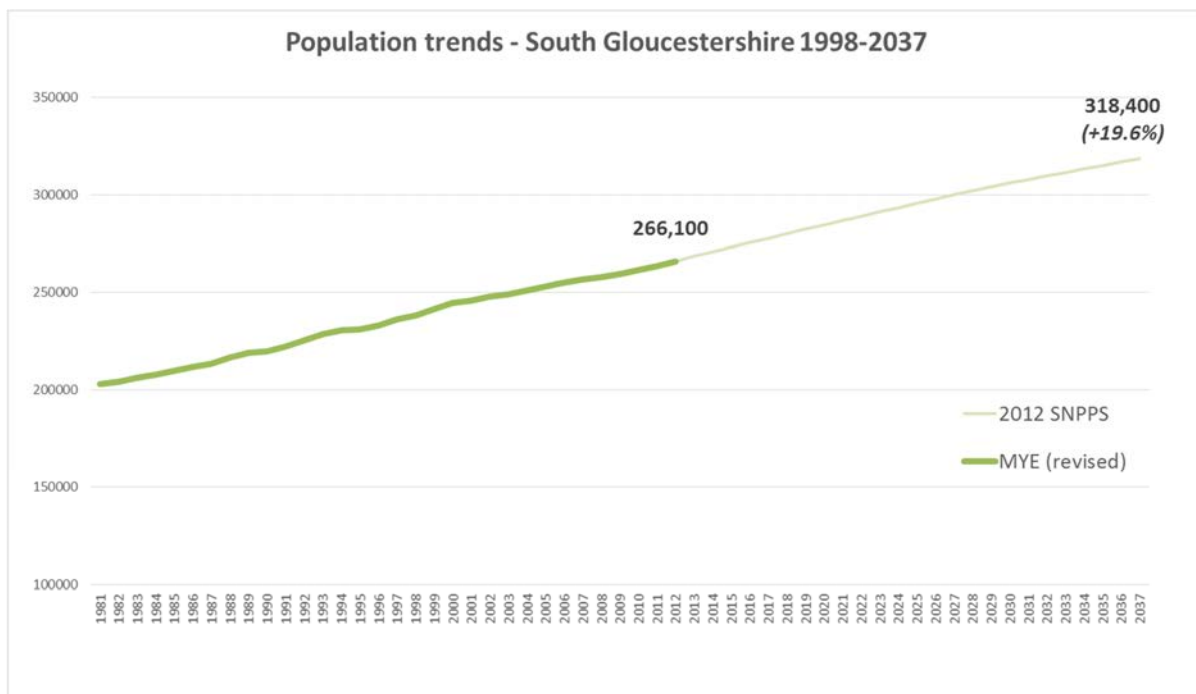


Fig1. Estimated and projected population change in South Gloucestershire 1981-2037

¹ These projections replace both the ONS’ 2010-based projections and the interim 2011 based projections.

By 2037 the population of the West of England sub-region is projected to increase by 218k to approximately 1.3 million people. North Somerset and Bristol are projected to undergo the highest rates of population growth over this period (at 23.8% and 22.1% respectively), and Banes the lowest (12.1%).

	Total population		Change	
	2012 #	2037 #	Change 2012-37 #	Change 2012-37 %
BANES	177,600	199,100	21,400	12.1
Bristol	432,500	528,200	95,700	22.1
North Somerset	204,400	253,000	48,600	23.8
South Gloucestershire	266,100	318,400	52,200	19.6
West of England	1,080,600	1,298,600	218,000	20.2

Table 1: Projected population change West of England sub-region 2012-37

3. Rates of population growth

The projections suggest that the rate of population growth in South Gloucestershire will gradually slow through the projection period; from an average of +2,300 people per annum (ppa) over the period 2012-24, to an average of +1,900 ppa from 2024-37 (fig 2). These trends are replicated (to different extents) in Bristol and North Somerset. Banes however is projected to undergo a period of higher growth towards the middle of the projection period.

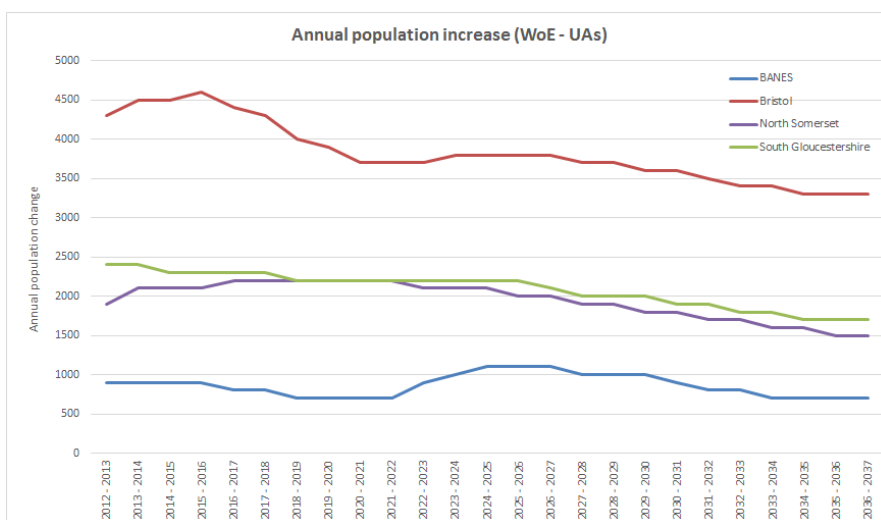


Fig 2: Annual population increases (WoE – Uas)

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 to slow (from a net increase of +1,000 ppa in 2012/13 to +600ppa in 2036/37) – related to the aging female population.
- *Migration*: Population growth through (total) migration is also projected to slow through the projection period; from a net increase of 1,400 ppa in 2012/13 to 1,100 ppa in 2036/37.

Fig 3. Also illustrates the very high projected flows of internal migrants² into and out of the district. Projected flows (and net change) from international migration and cross-border flows³ are projected to be considerably lower; annual rates of (net) cross-border migration are fixed at -100 ppa, whilst rates of (net) international migration are also projected to remain consistent at around +500ppa.

² Internal migration: Moves between local authorities in England.

³ Cross-border migration: Moves between England and Wales, Scotland and Northern Ireland

Components of projected population change - South Gloucestershire (2012-37)

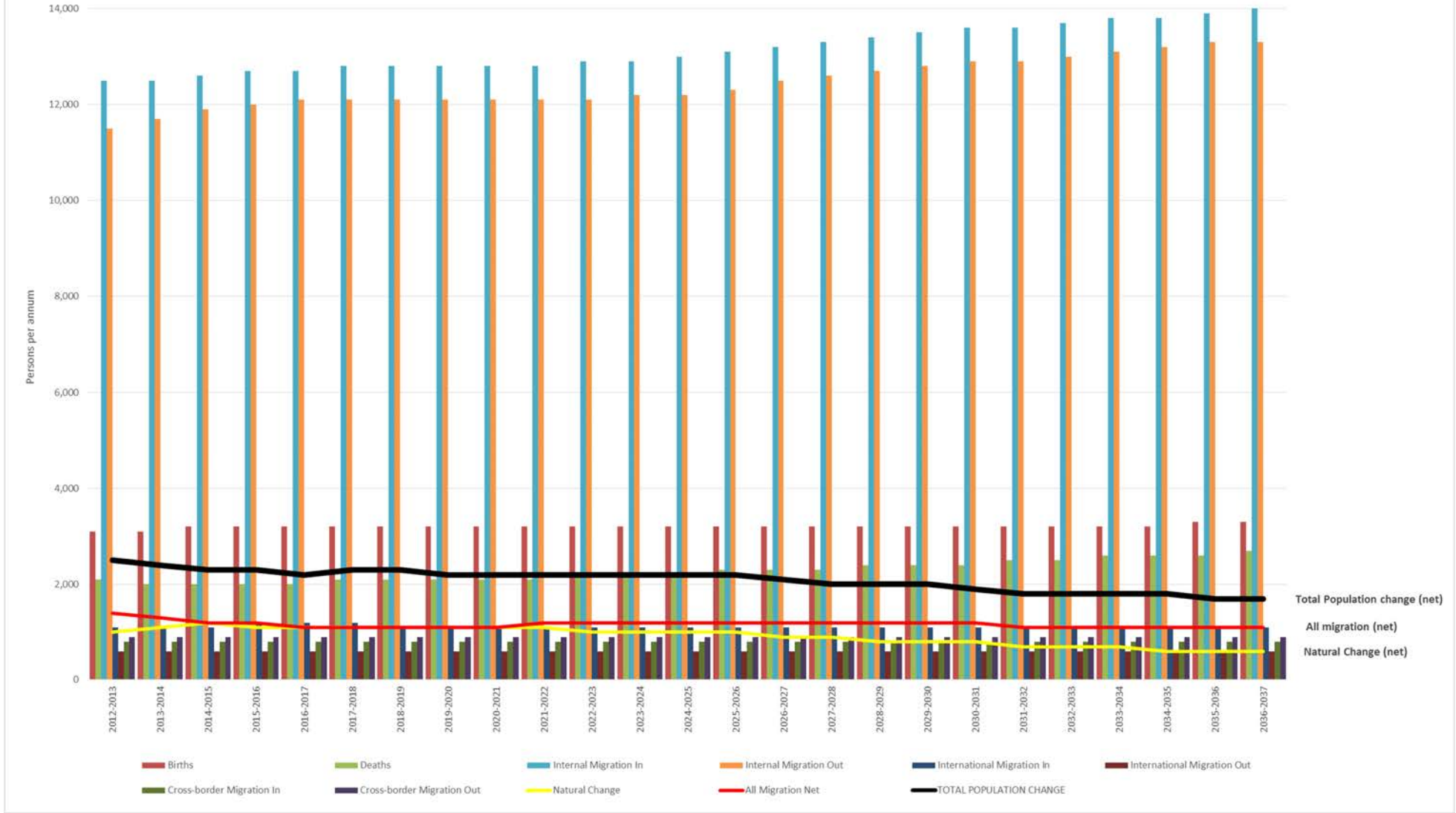


Fig 3: Annual population increases (WoE – Uas)

5. Age structure change

Currently in South Gloucestershire⁴, approximately 19% of the resident population are children, nearly two thirds (64%) are of working age (16-64yrs) and 18% are over the age of 65yrs. By 2037, the latest ONS projections suggest that:

- The number of children will have increased by 6,400 -although proportions will remain consistent (at 18%);
- The number of working age residents will have increased by 13,800 (representing a 6% decrease in proportional terms) and;
- The number of older people (those aged over 65yrs) will have increased by 32,000 (representing a 7% increase in proportional terms)

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

Age Group	Counts (#)				Proportion of population (%)		
	2012 #	2037 #	Change #	Change %	2012 %	2037 %	Change %
Children (0-15yrs)	50,000	56,400	6,400	12.9%	19%	18%	-1%
Working age (16-64 yrs)	169,600	183,300	13,800	8.1%	64%	58%	-6%
Older people (65+)	46,600	78,600	32,000	68.7%	18%	25%	+7%
Total	266,100	318,400	52,200	19.6%	100%	100%	0%

Table 2. South Gloucestershire - Broad age structure change 2012/37

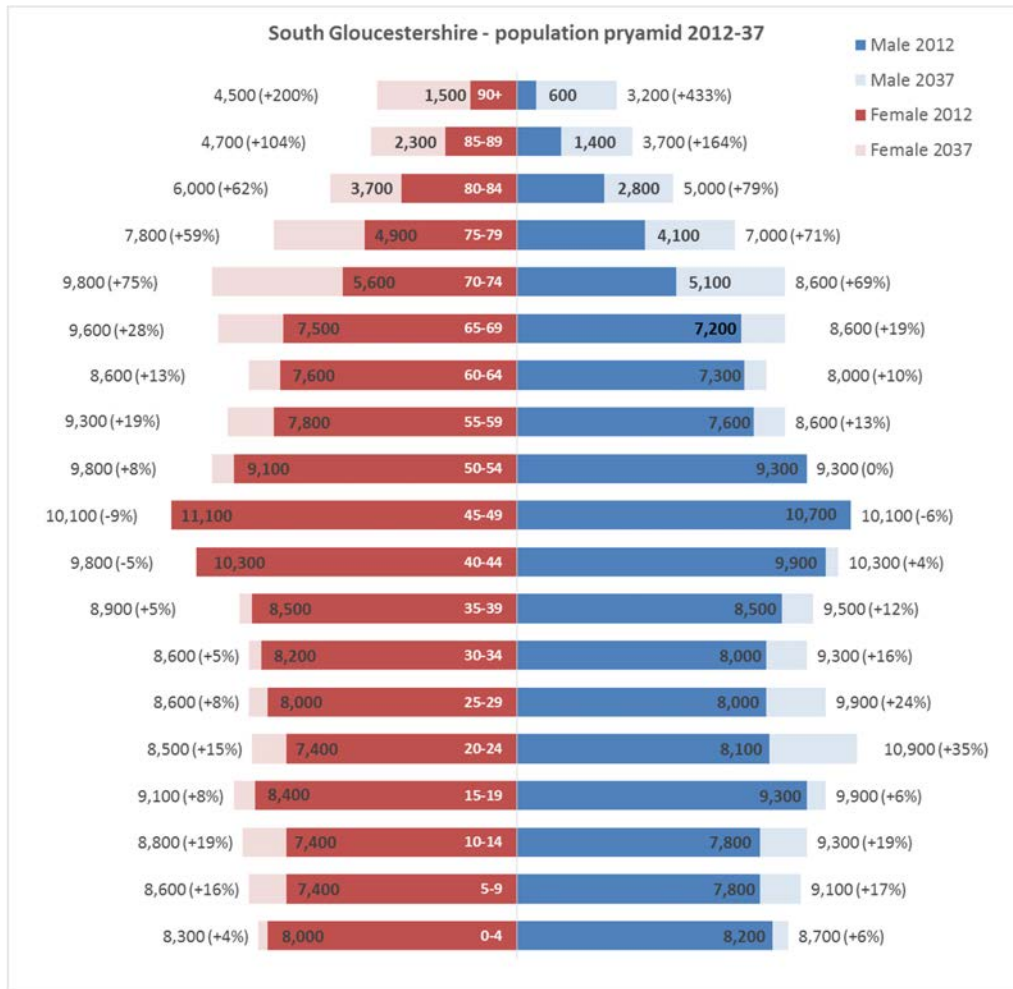


Fig 4. South Gloucestershire - Age structure change 2012/37 (5 year age/sex)

⁴ According to the ONS 2012 mid-year population estimates

Fig 5. illustrates the same dataset in proportional terms. In 2037, South Gloucestershire is projected to have a ‘flatter’ age structure, with a lower proportion of residents aged between 30-50yrs and a higher proportion aged over 65yrs. The most significant increase is projected in 90+ age band (+5,600 more residents), which will increase the proportion of the total population in this age group from 0.8% to 2.4% .

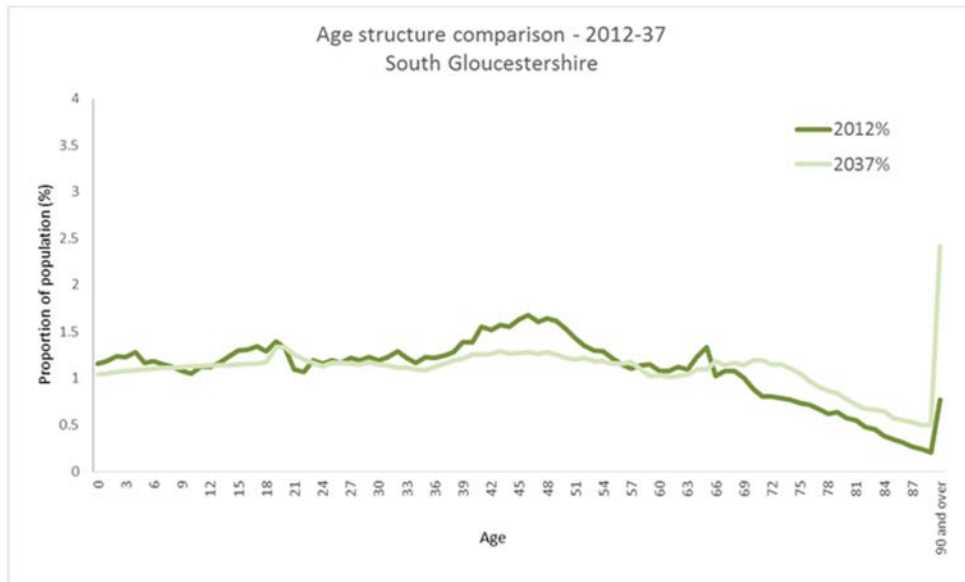


Fig 5. South Gloucestershire – proportional age structure change 2012/37

Figs 6 (a-d). Illustrate the variation in the current and projected age structures of the local authorities in the sub-region. The national trend towards an aging population can be seen to varying degrees; North Somerset in particular is projected to undergo a significant increase in the number of residents aged over 90yrs (+6,500) –increasing the proportion of its population in this age-band from 1.3% to 3.6%.

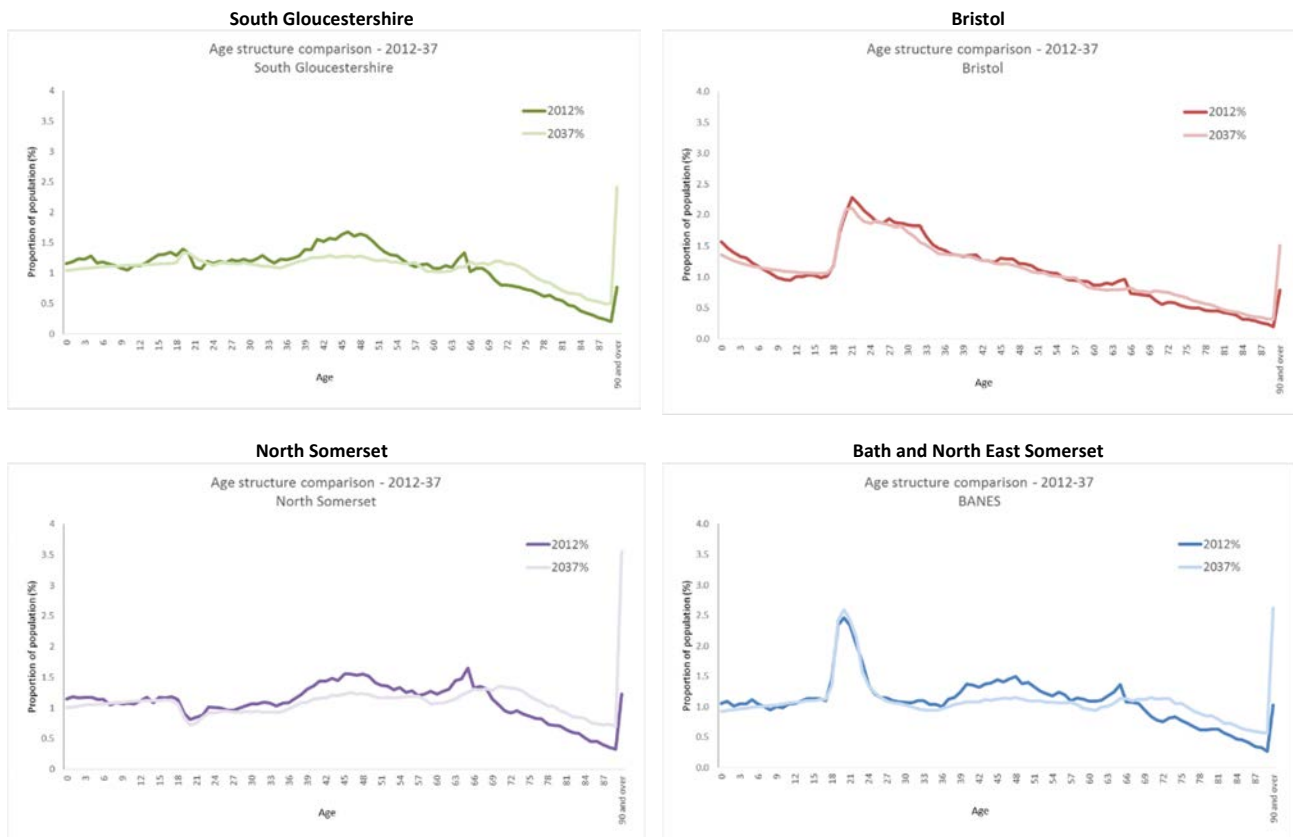


Fig 6 (a-d). Comparison of age structure change 2012/37 – West of England UAs

6. Comparison with previous ONS projections

The ONS generally update their population projections (SNPPs) every two years. Fig 7 compares the 2012 SNPPs for South Gloucestershire with other recently published ONS projections⁵.

Over the ten year period 2011-2021 (the mid-term) – these latest projections suggest that; at an average of +2,300 persons per year (ppa), the population of the district will increase at a slower rate than was projected by the 2011-based SNPPs (+2,600 ppa) and a considerably lower rate than was projected by the 2008-based SNPPs (+2,900 ppa). The latest projections however are higher than the 2010-based SNPPs (+1,900 ppa). These trends are also replicated over the longer term (Table 3 and Fig 8).

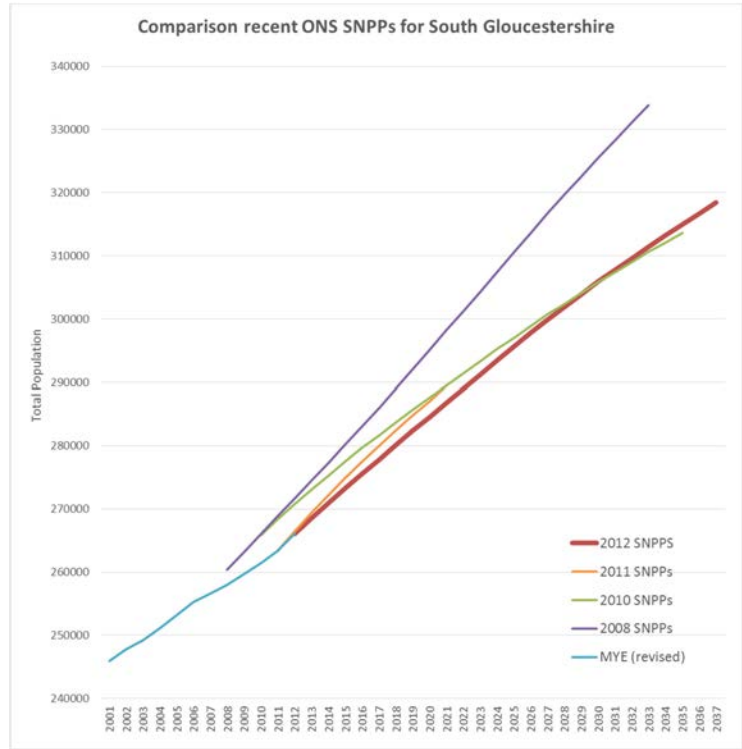


Fig 7. Comparison of recent ONS SNPPs for South Gloucestershire – Total population

	Projection period	Average annual increase (persons per year)			
		Long-term trend (over full projection period)	Difference to 2012 SNPPs	Mid-term trend (over period 2011-21)	Difference to 2012 SNPPs
2012 SNPPs	2012-2037	2,100	-	2,300	-
2011 SNPPs	2011-2021	2,600	+500	2,600	+300
2010 SNPPs	2010-2035	1,900	-200	2,100	-200
2008 SNPPs	2008-2033	2,900	+800	2,900	+600

Table 3. Comparison Annual rates of population growth - structure change 2012/37 – West of England UAs

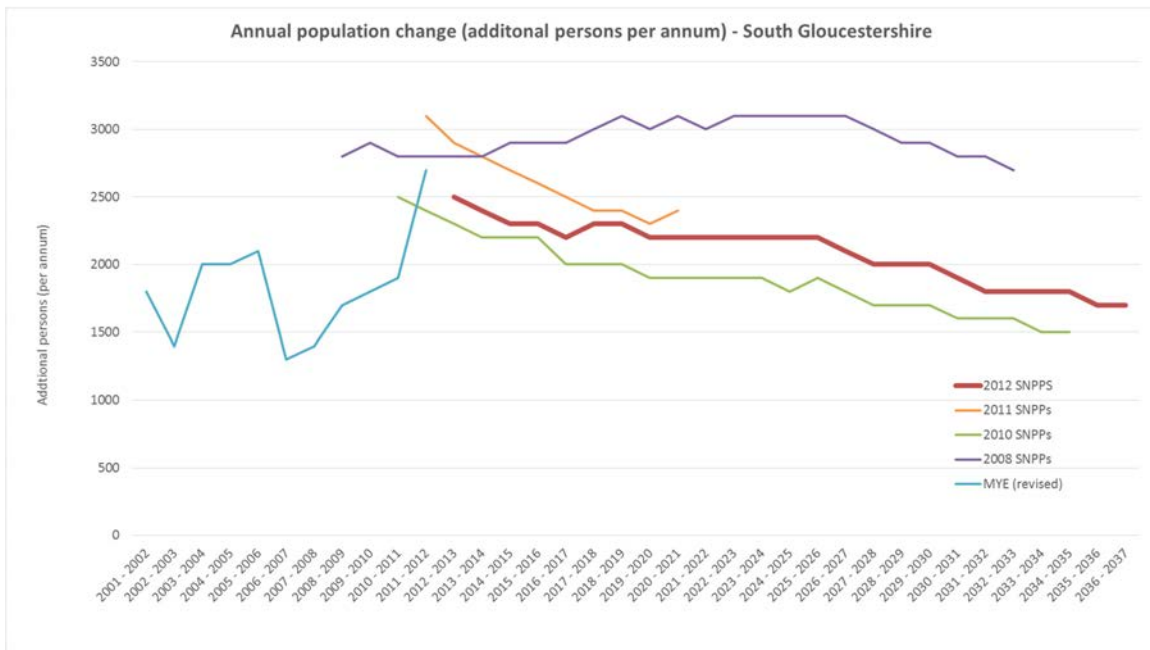


Fig 8. Comparison of recent ONS SNPPs for South Gloucestershire – Total annual change in population

⁵ Direct comparison between projections is complicated by the fact that the various projections are based on different timescales.

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