

1. Introduction

This briefing note presents the key findings from the 2016-based sub-national population projections (SNPPs) for South Gloucestershire. The new projections were published by the Office for National Statistics (ONS) on 24 May 2018 and replace the 2014-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.

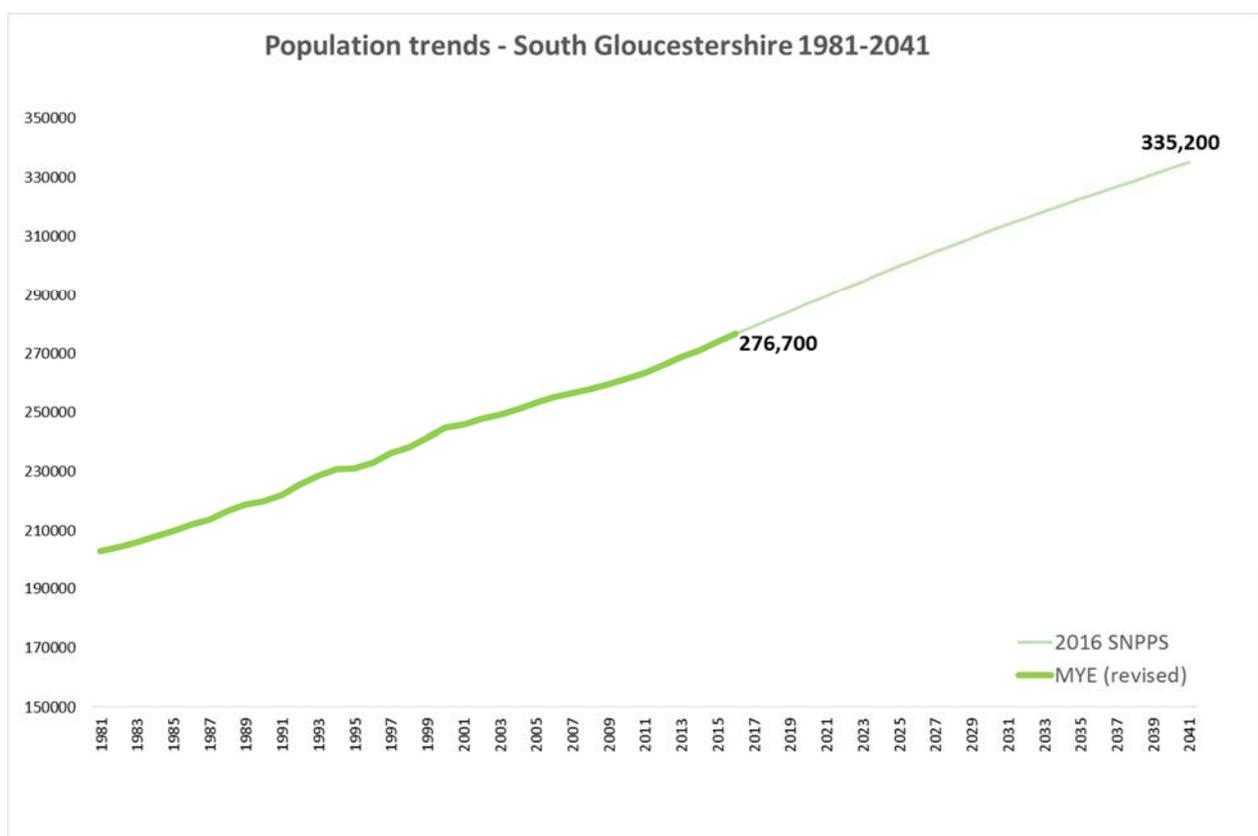
The primary purpose of the sub-national projections is to provide an estimate of the future size and age structure of the population of local authorities in England. These are used as a common framework for informing local-level policy and planning in a number of different fields as they are produced 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 335,200 in 2041, a 21.1% increase on the 2016 baseline (276,700).

Fig1. Estimated and projected population change in South Gloucestershire 1981-2041



By 2041 the population of the West of England sub-region is projected to increase by 221,900 to approximately 1.35 million people. South Gloucestershire is projected to undergo the highest rates of population growth over this period at 21.1%, closely followed by Bristol at 20.9%. Banes is projected to have the lowest (15.1%).

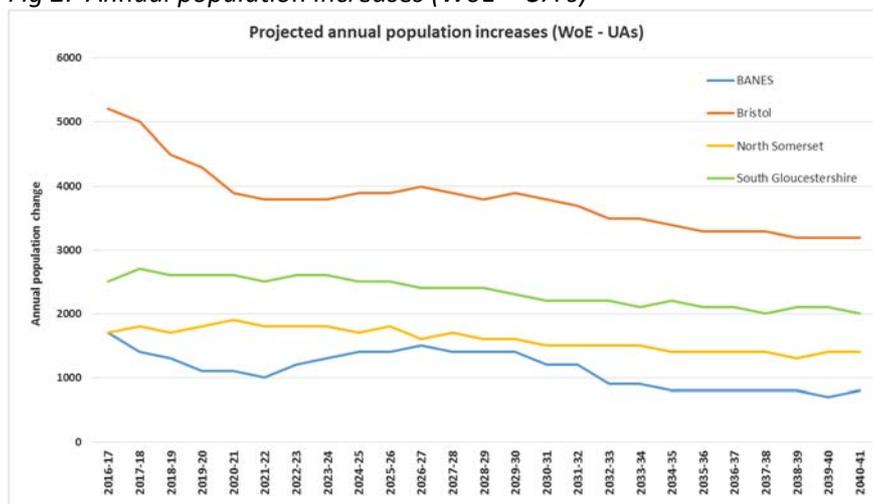
Table 1: Projected population change West of England sub-region 2014-39

	Total population		Change	
	2016 Count	2041 Count	Change 2016-41 Count	Change 2016-41 %
BANES	186,900	215,200	28,300	15.1%
Bristol	456,000	551,100	95,100	20.9%
North Somerset	211,700	251,700	40,000	18.9%
South Gloucestershire	276,700	335,200	58,500	21.1%
West of England	1,131,300	1,353,200	221,900	19.6%

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 +2,500 people per annum (ppa) over the period 2016-28, to an average of +2,200 ppa from 2028-41 (Fig 2). This trend is replicated in North Somerset. Banes however is projected to undergo a period of higher growth towards the middle of the projection period and Bristol projections suggest a faster rate of decline in growth between 2016 and 2020.

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 be fairly consistent year on year between 2016 and 2041 with the annual net increase predicted to be approximately +900ppa.
- **Migration:** Population growth through (total) migration is projected to slow through the projection period; from a net increase of 1,700 ppa in 2016/17 to 1,200 ppa in 2040/41. 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; annual rates of (net) cross-border migration are fixed at -100 ppa, whilst rates of (net) international migration are projected to decline from 600ppa in 2016/17 to 400ppa in 2040/41.

¹ Internal migration: Moves between local authorities in England.

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

Components of projected population change - South Gloucestershire (2016-41)

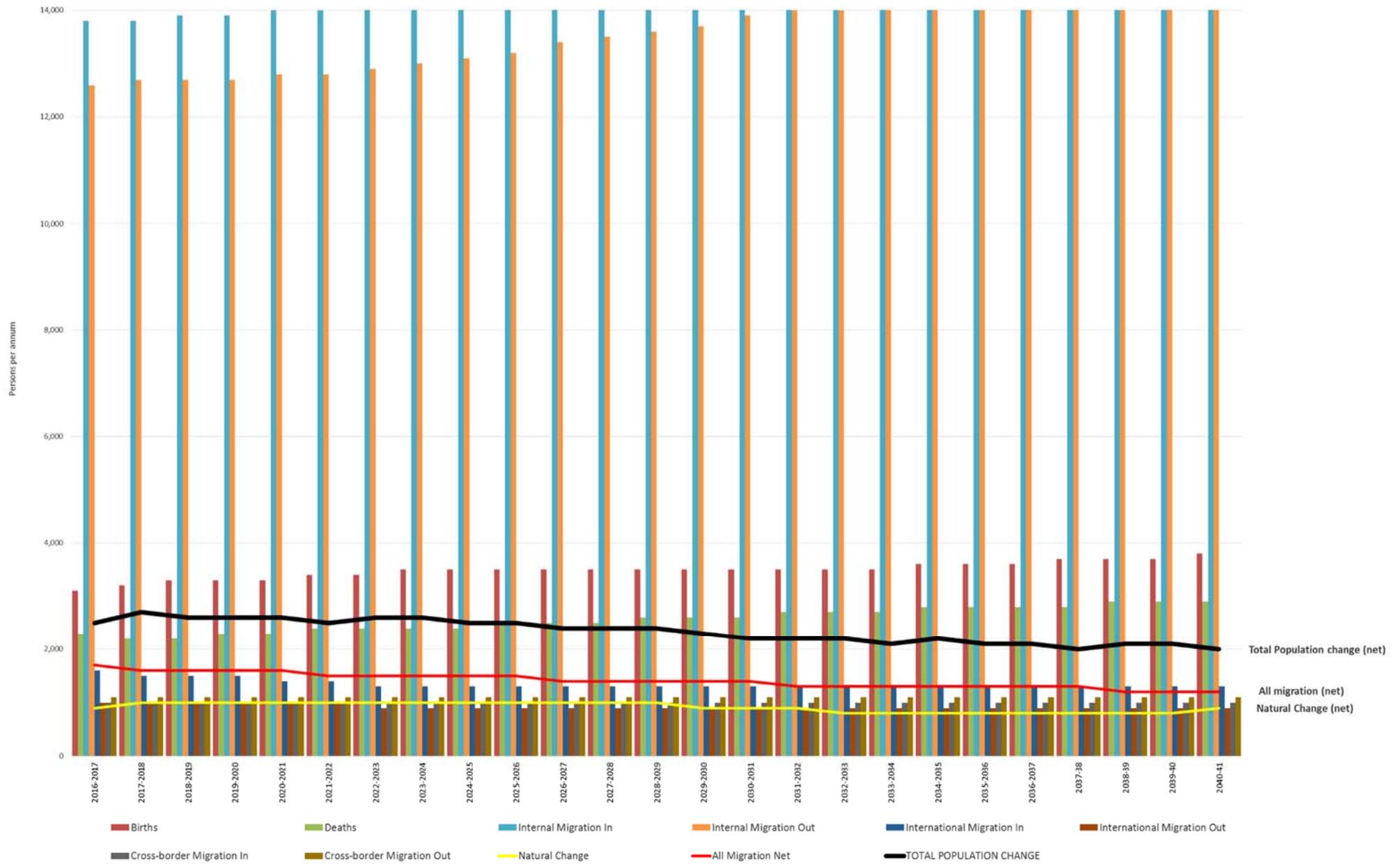


Fig 3: Annual population increases (WoE – UA’s)

5. Age structure change

Currently in South Gloucestershire³, approximately 19% of the resident population are children, nearly two thirds (63%) are of working age (16-64yrs) and 18% are over the age of 65yrs. By 2041, the latest ONS projections suggest that:

- The number of children will have increased by 9,900 - although proportions will remain broadly consistent (at 18%-19%);
- The number of working age residents will have increased by 24,100 (representing a 4% decrease in proportional terms);
- The number of older people (those aged over 65yrs) will have increased by 24,500 (representing a 4% increase in proportional terms).

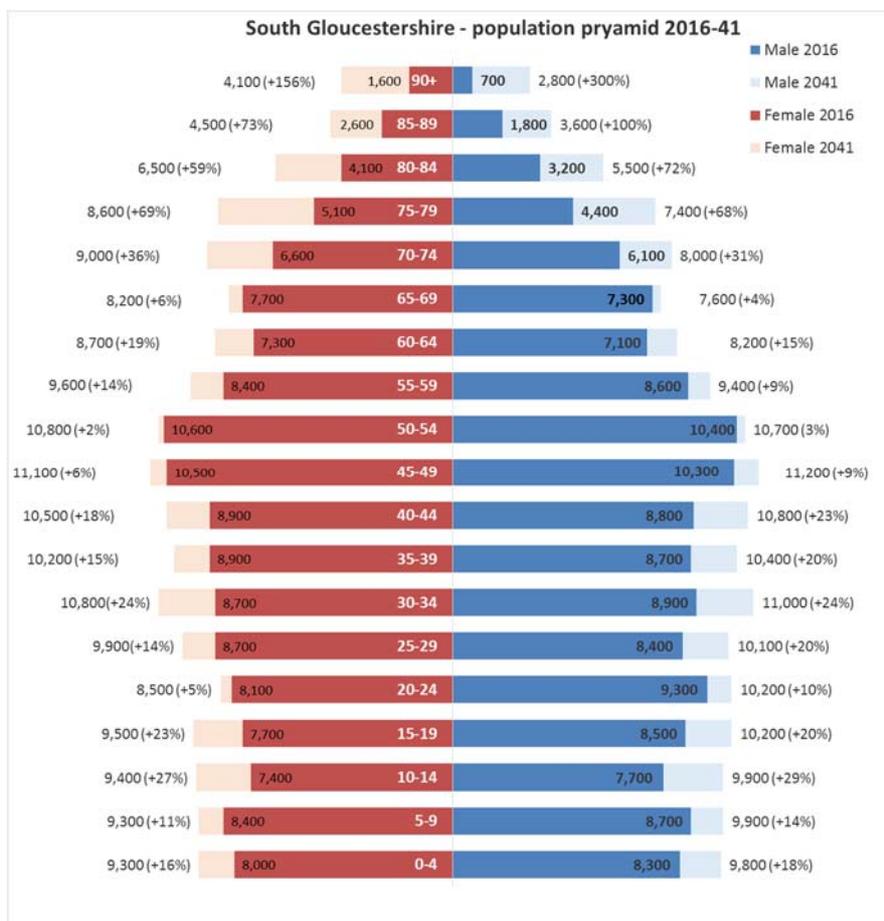
These trends are illustrated in Table 2 and graphically in Figs 4-6.

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

Population change 2016-41					Proportion of population (%)		
Age Group	2016 counts	2041 counts	Change counts	Change %	2016 %	2041 %	Change %
Children (0-15yrs)	51,500	61,400	9,900	19%	19%	18%	-1%
Working age (16-64 yrs)	173,800	197,900	24,100	14%	63%	59%	-4%
Older people (65+)	51,400	75,900	24,500	48%	19%	23%	4%
Total	276,700	335,200	58,500	21%	100%	100%	0%

Source: Nomis population projections by single year of age (figures rounded to nearest 100)

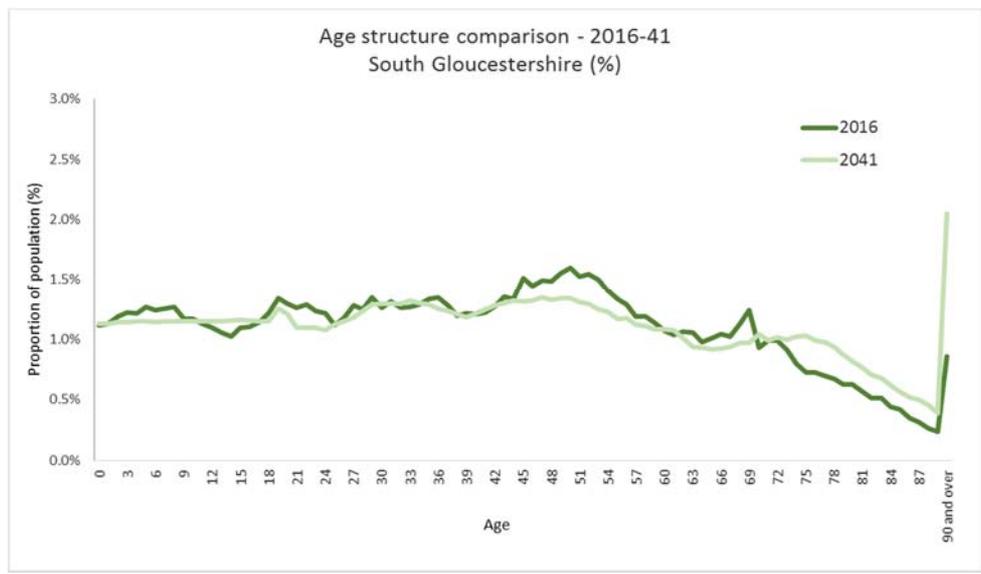
Fig 4. South Gloucestershire - Age structure change 2016/41 (age/sex)



³ According to the ONS 2016 mid-year population estimates (revised)

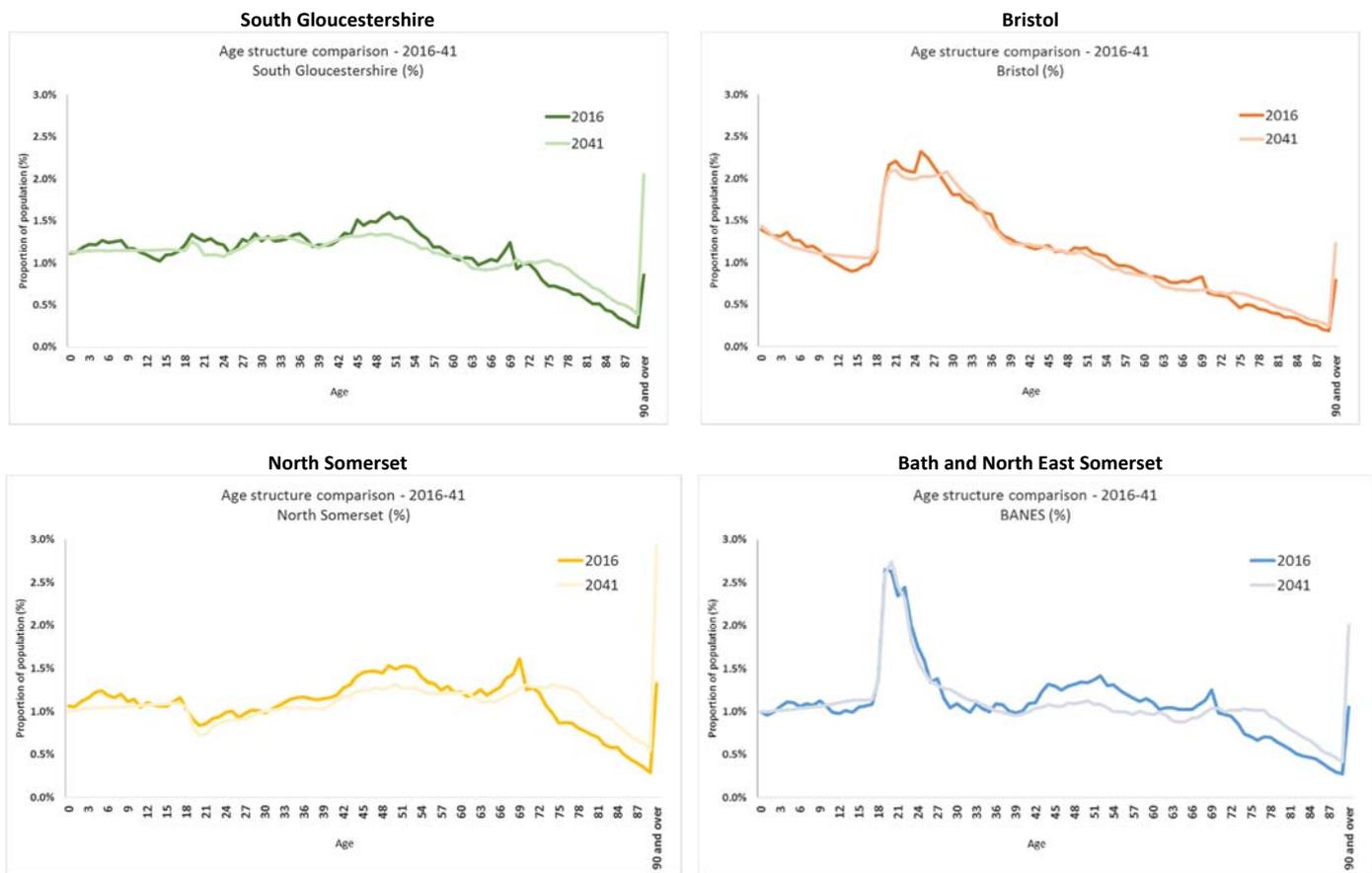
Fig 5. illustrates the same dataset in proportional terms. In 2041, South Gloucestershire is projected to see an increase in population in all age groups. Notably it is projected there will be a higher proportion of the population aged over 65yrs. The most significant increase is projected in the 90+ age band (+189%), which will increase the proportion of the total population in this age group from 0.9% to 2.1%.

Fig 5. South Gloucestershire – proportional age structure change 2016/41



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 (+4,550) –increasing the proportion of its population in this age band from 1.3% to 2.9%. There is also a general trend towards a reduction in the number of 45-65 year olds across all four areas to varying degrees, with Bristol seeing the least change for this age group and BANES seeing the greatest decrease.

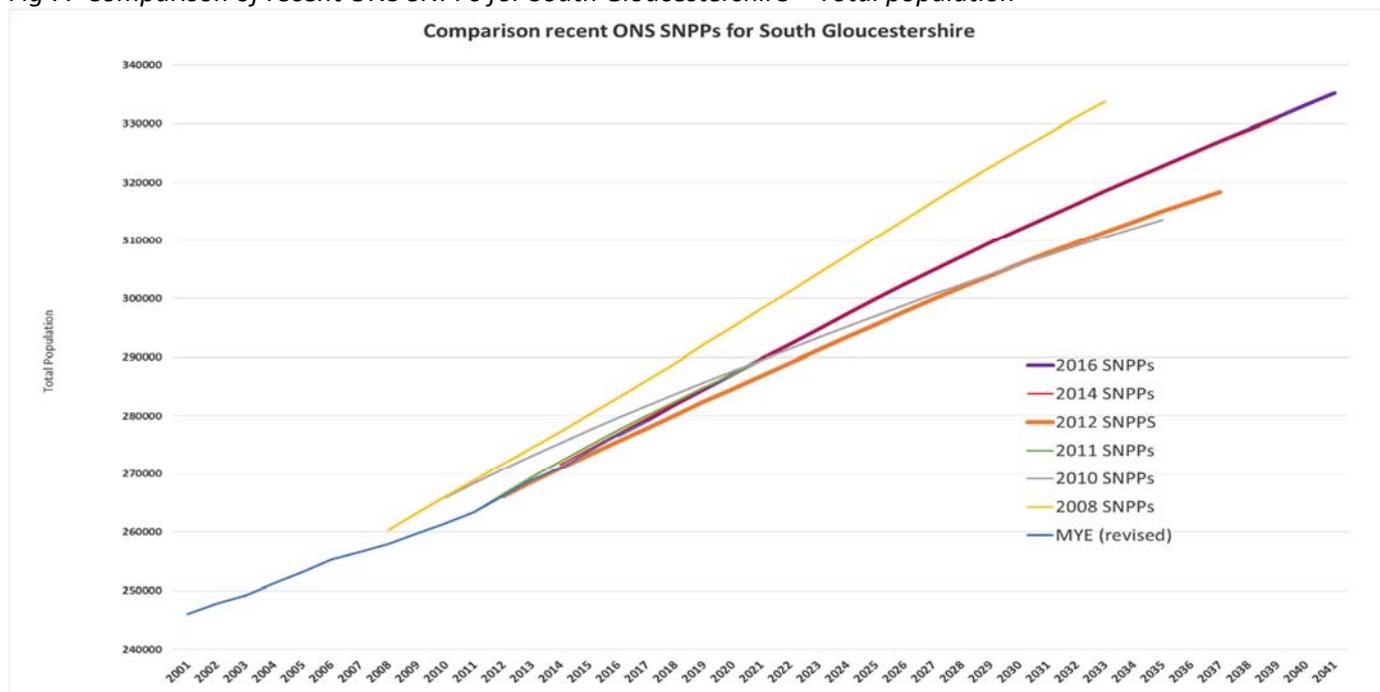
Fig 6 (a-d). Comparison of age structure change 2016/41 – West of England UAs



6. Comparison with previous ONS projections

The ONS generally update their population projections (SNPPs) every two years. Fig 7 compares the 2016 SNPPs for South Gloucestershire with other recently published ONS projections⁴.

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



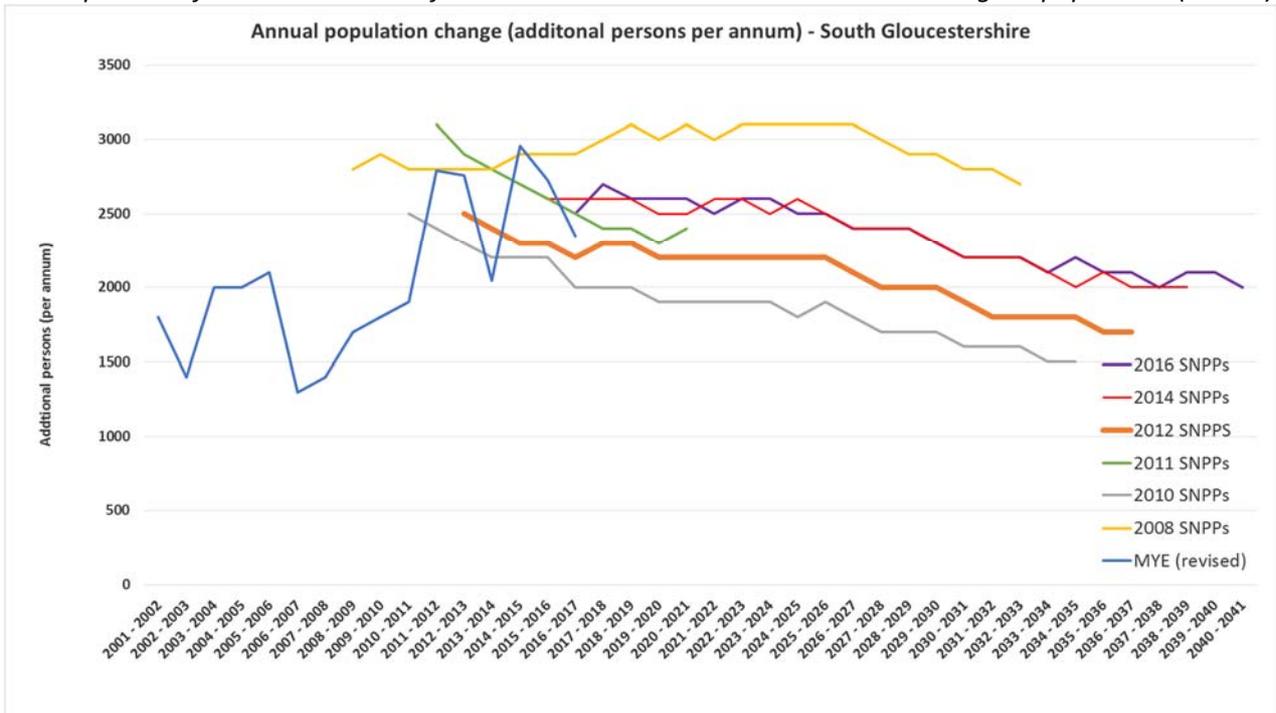
These latest projections suggest that; at an average of +2,300 persons per year (ppa), the population of the district will increase at a slower rate than was projected by the 2014-based SNPPs (+2,400 ppa) and a considerably lower rate than was projected by the 2008-based SNPPs (+2,900 ppa). The latest projections however are higher than the 2012-based SNPPs (+2,100 ppa) and 2010-based SNPPs (+1,900).

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

Average annual increase (persons per year)			
	Projection period	Long-term trend (over full projection period)	Difference to 2016 SNPPs
2016 SNPPs	2016-2041	2,300	0
2014 SNPPs	2014-2039	2,400	100
2012 SNPPs	2012-2037	2,100	-200
2011 SNPPs	2011-2021	2,600	300
2010 SNPPs	2010-2035	1,900	-400
2008 SNPPs	2008-2033	2,900	600

⁴ 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